Ipsos Reid

National Energy Board | Office national de l'énergie

National Energy Board
Landowner Satisfaction Research

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«Ce rapport est aussi disponible en français sur demande»

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TABLE OF CONTENTS

Executive Summary 1

- Introduction 1
- Key Findings 2
- Methodology 5

Detailed Findings 8

- Demographic Profile 8
- Familiarity with and Knowledge about Pipeline on Property 9
- Views on Reclamation 18
- Pipeline Safety and Security 22
- Communications *from* Pipeline Companies 28
- Communications *to* Pipeline Companies 32
- Communication with the NEB 36
- NEB Publications 43
- NEB Events 48
- NEB Website 52
- Additional Comments 57

Appendix I – Questionnaire 58

Executive Summary

Introduction

The National Energy Board (NEB) is an independent federal agency which regulates various aspects of Canada's energy industry, including the construction and operation of pipelines. This research is designed to obtain feedback from a key constituency: the landowners on whose property the NEB-regulated pipeline runs.

This report provides the detailed results of a survey of 1,200 landowners who were identified among 32,114 records provided by companies operating NEB-regulated pipelines.

During the survey, landowners were asked a host of questions related to their familiarity and knowledge about the pipeline on their property, their satisfaction with the reclamation of the land under which a pipeline runs, and their experience and satisfaction with communications they have had with pipeline companies and the NEB.

Comparisons are made throughout this research to findings from a similar 2004 study conducted among landowners. While similar in purpose, many of the question areas in the present research are new, and are therefore not tracked with the 2004 result. In addition, the 2004 survey sample was constructed very differently, with a much higher proportion of Ontario landowners and lower proportion of Alberta landowners, than we have identified among the 2011 population of landowners.

Key Findings

Familiarity with and knowledge about the pipeline on their property

We find that 71% of landowners mention a company other than the one indicated in the sample records we received, suggesting that many landowners may not know who the correct company is. In some cases, this appears to be a matter of nomenclature, with many respondents saying that their company is "TransCanada" when our information was provided by an operating unit of TransCanada (most particularly, NOVA Gas Transmission Limited). In other cases, landowners are mistaken, mentioning TransCanada when theirs is another company entirely (as is the case with Kinder Morgan's landowners, of whom 35% mention TransCanada).

Apart from this, landowners tend to express high levels of familiarity with the pipeline on their property: nearly all say that they know where the pipeline is located, and three in four say that they know where the limits of the right of way are. Just 6% say that they don't know how close the pipeline is to the dwelling or place of work on their property.

Knowledge about the regulator of the pipeline is less clear. Just over one in three (36%) say that the pipeline is regulated by either the federal government alone or by a combination of the federal and provincial governments. The remaining two thirds say that it is either the provincial government alone (26%) or that they don't know whether the regulator is federal or provincial (38%).

Satisfaction with reclamation

Two thirds of respondents (67%) say that they are satisfied with the reclamation of their right of way, which is explained as the land over the pipeline. About one in seven (13%) say that they are dissatisfied. Those satisfied most often say simply that there have not been any problems. Those dissatisfied report a variety of issues, most commonly mentioning that the land sinks or is not level, that repairs have not been performed or that the land has otherwise not been returned to its original condition.

Pipeline safety and security

Substantial majorities of respondents say that the pipeline company checks on the safety of the pipeline on their property (79%), and that they are familiar with the requirements to follow when working near a pipeline (92%). Three in four say that the pipeline company has provided information on what to do in the event of an emergency or suspicious activity near the pipeline.

Three in five respondents (60%) express confidence that the pipeline company is doing enough to ensure the safety of the pipeline on their property, while 14% say that they are not confident. Confidence that the NEB is doing enough to ensure the safety of pipelines in Canada is lower (50%), while 18% say they are not confident.

Majorities of respondents say that they are not concerned with various aspects of having a pipeline on their property. The highest levels of concern are with respect to the possible impact of the pipeline on property values (41% concerned) and the integrity of the pipeline (36%). Concerns with possible impact on farming or commercial uses (36%), the

environmental impact (34%) and the security of the pipeline from malicious acts (26%) are lower.

Communications with pipeline companies

Seven in ten respondents (69%) say that the pipeline company contacts them at least once a year or more often, most commonly with respect to safety concerns, construction issues or compensation issues. Over three in four respondents (77%) express satisfaction with the contact that they have had from their pipeline company.

About one in three respondents (34%) say that they have contacted their pipeline company in the past five years, most often to discuss construction or compensation issues. Three in four respondents say they are satisfied with the overall way in which they were treated during this contact.

Communications with the NEB

Respondents were asked whether, in the past five years, they had initiated communications with the NEB. Few landowners (5%) say that they have done so. Those who have most often say that they contacted the NEB with an issue related to construction, to make a complaint, or with an issue related to compensation.

The 5% of landowners, or 52 respondents, were asked to rate their satisfaction with the service they experienced during their most recent contact with the NEB. On this basis, about half of these respondents reported that they were satisfied with the accessibility of the NEB (49%), with the overall way in which they were treated by the NEB (47%) and with the amount of time it took to make contact with the NEB (46%). Just over one in three (36%) say that they were dissatisfied with the overall way in which they were treated, while about one four say they were dissatisfied with the accessibility of the NEB (28%) and with the amount of time it took to make successful contact with the NEB (25%).

NEB Publications

One in three respondents say that they have received publications from the NEB, either directly or from their pipeline company. Those who have received publications most often say that they dealt with living and working safely around pipelines, pipeline crossing regulations, and how to contact the NEB. Two in three respondents say that they were satisfied with the information they received. Majorities agree that the information they saw was up-to-date, accurate, consistent, easy to understand and provided information they needed.

NEB Events

About one in ten respondents say that they have attended an NEB event, most often a public information session (7%) or a hearing (4%). At least three in five respondents express satisfaction with respect to the event location, date and time, the prior notice of the event and the clarity of information about the event. About half (52%) express

satisfaction with the usefulness of the event itself, while 25% express dissatisfaction in this regard (22% express neutral views).

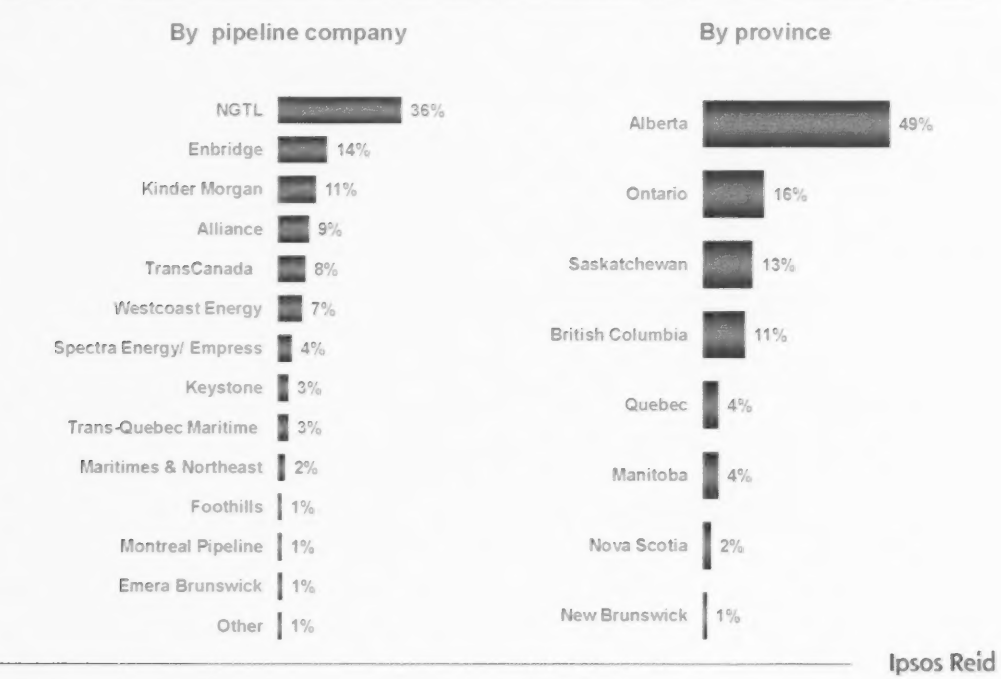
Methodology

Ipsos Reid conducted interviews between August 10 and September 6, 2011, among n=1,200 landowners who own land where an NEB regulated pipeline runs. Landowner records were gathered from companies operating NEB-regulated pipeline in Canada. All companies operating regulated pipeline were contacted and asked to submit records.

In total, 29 companies representing 90% of the regulated kilometres of pipeline provided records. A total of 32,114 sample records were provided. Of these records, 18,296 records were usable (non-duplicate records with complete contact information).

Based on an analysis of the sample records provided, we define the population of landowners by two key characteristics: the province where the property is owned and the company running pipeline through the property. The table below outlines the proportions by each characteristic nationwide.

Population Universe



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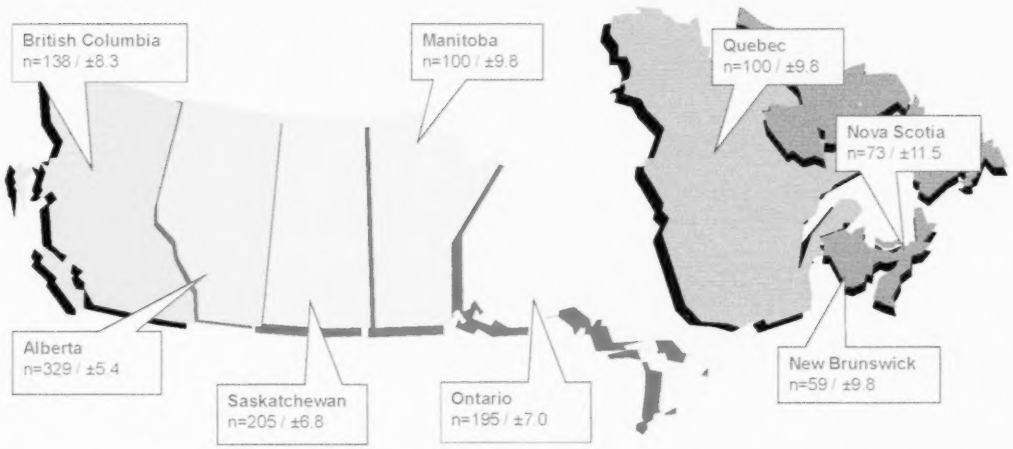
Quotas were established on the basis of the province where the property is owned and based on the company running pipeline on the property. Rather than allocating this sample proportionally, we implemented a disproportionate scheme in order to increase the sample size in smaller regions. The data were weighted according to the characteristics of the actual population to ensure that the results are a reflection of the views of the population as a whole. The table below indicates the final unweighted sample obtained by province, along with the associated margins of error. The margin of error on the total sample of n=1,200 is ±2.8 percentage points.

Results in Field – by Province



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The response rate calculation below is based on the Marketing Research and Intelligence Association's Empirical Calculation, and represents a measurement of the effectiveness of the study in field. A total of 11,332 records were dialled (with at least eight call-backs placed per record before resolving or retiring the record).

Empirical Calculation for Data Collection	
Total Numbers Attempted	**11,332**
Invalid (NIS, fax/modem, business/non-res.)	1,688
Unresolved (U) (Busy, no answer, answering machine)	4,840
In-scope - non-responding (IS)	**3,231**
Language problem	26
Illness, incapable, deaf	108
Household refusal	2,131
Respondent refusal	86
Qualified respondent break-off	880
In-scope - Responding units (R)	**1,573**
Over quota	6
Does not have pipeline on property/ no longer the owner/ doesn't know province where property is located	367
Completed interviews	1,200
Response Rate = R/(U+IS+R)	**16%**

Detailed Findings

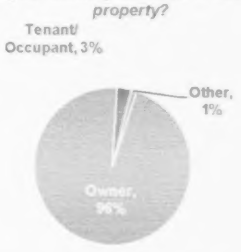
Demographic Profile

All respondents contacted to complete a survey were asked if they are aware that a pipeline runs across or under their property (question 1 in the survey). Those who said no or don't know (question 2) were told that the records indicated that they own or live on a property through which a pipeline runs and were asked if there was someone else in the household who could confirm this. If so, the next person in the household was asked if they are aware of a pipeline on their property. On the basis of these screening questions, only those aware of having a pipeline were included in the sample (others were discontinued). Of the 1,573 respondents successfully contacted to complete a survey, 367 respondents (or 23%) were not aware of a pipeline on their property.

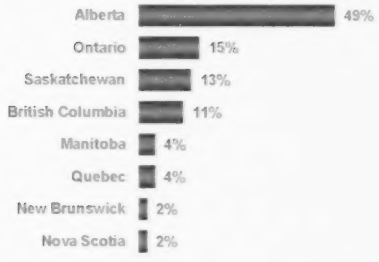
Among those aware of the pipeline on their property, the following table indicates the results of several questions asking whether they are the owner or tenant of the property, which province the property is located, how the property is used (i.e., as agricultural land or as a residence), and what best describes the area in which the property is located.

Demographic Profile

Q3. Are you currently an owner or tenant of this property?



Q5. In which province is this property located?



Q54. Which of the following best describes how your property is currently used?

n=1,200	
Agricultural	78%
Residential	25%
Woodlands or woodlot	13%
Business or commercial	5%
Recreational	1%
Industrial	1%
Other	1%
None	0%
Don't know/Not stated	1%

Q55. And which of the following best describes the area in which your property is located? Is it...

n=1,200	
A large or medium sized city	6%
A suburban area	3%
A town or village	8%
A rural area	82%
A small city	0%
Other	1%
Don't know/Not stated	1%

Base: All respondents n=1,200

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Familiarity with and Knowledge about Pipeline on Property

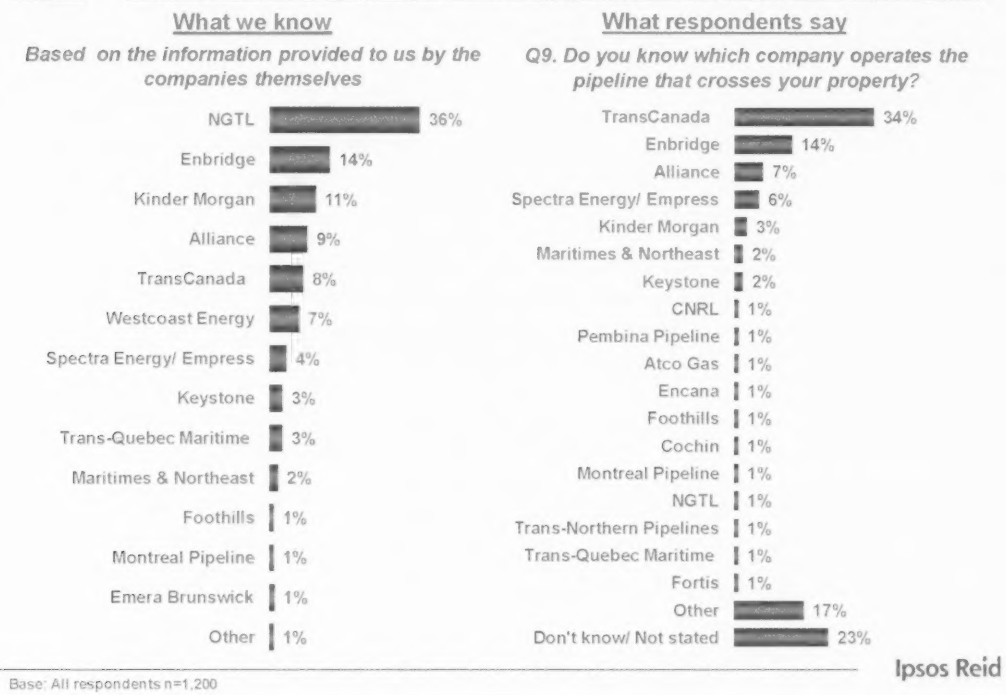
Respondents were asked several questions pertaining to their knowledge about the pipeline on their property, including which company services the pipeline, where the pipeline is located, its location relative to the dwelling or place of business on the property, the contents of the pipeline crossing their property, and the level of government which regulates the pipeline.

Company that services the pipeline on their property

To conduct the surveys, Ipsos Reid was provided contact information for landowners from pipeline companies. During the survey itself, respondents were asked which company operates the pipeline crossing their property. The results show that the responses given by respondents during the survey frequently do not align with the company from which their contact information was obtained. In particular, a third of respondents identify TransCanada as the company which operates the pipeline on their property (34%). This is in contrast with the lists of potential respondents, where TransCanada represented 8% of the respondents. NOVA Gas Transmission Limited (NGTL), meanwhile, provided the highest proportion of sample records (36%), yet only 1% of respondents indicated NGTL as the company operating the pipeline on their property.

In addition to these differences, we found that one in five (23%) respondents could not identify the company that operates the pipeline on their property.

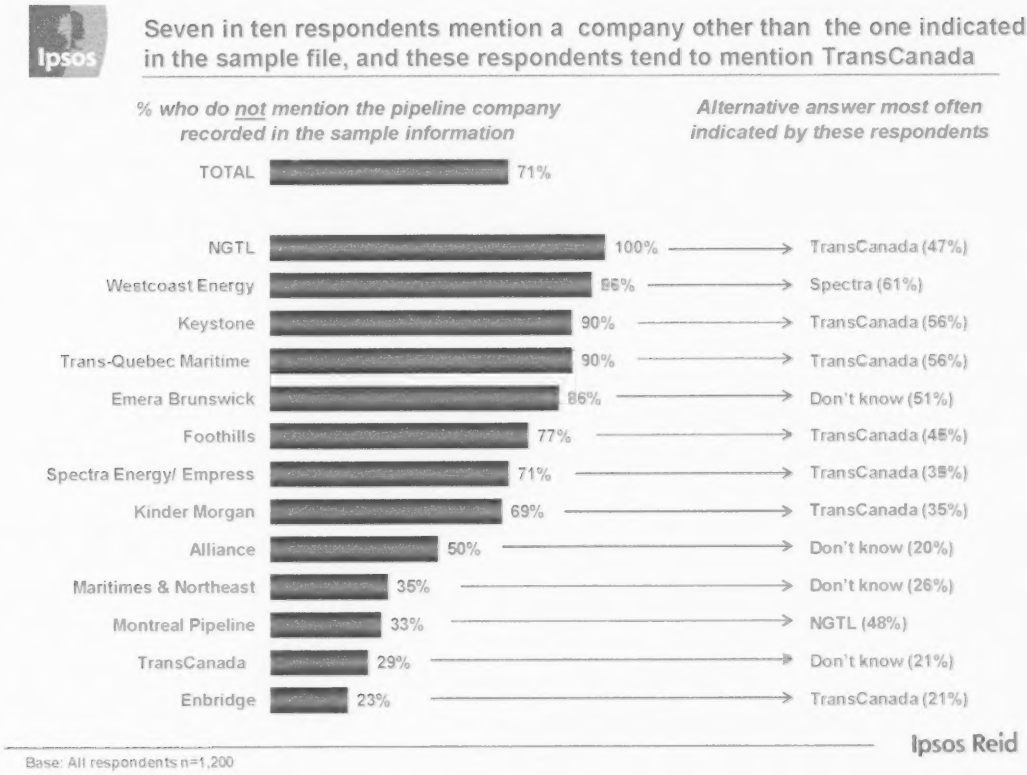
The profile of respondents by pipeline company: what we know from the sample information vs. what respondents say in the survey



Base: All respondents n=1,200

In some instances, respondents indicating a company other than the one in our sample file are not necessarily in error. For example, TransCanada Corporation owns NGTL, so respondents indicating TransCanada are correct. In other cases, they are not. For example, Kinder Morgan operates the Cochin and TransMountain pipelines independently of TransCanada, yet we find that 34% of respondents mention TransCanada as the company operating the pipeline on their property.

In total, seven in ten (71%) of respondents mention a company other than the one indicated in the sample file; as indicated below, these respondents typically mention TransCanada, although in a few cases we find substantial proportions who don't know which company operates the pipeline on their property (for example, 51% of respondents from Emera Brunswick).


Seven in ten respondents mention a company other than the one indicated in the sample file, and these respondents tend to mention TransCanada
% who do not mention the pipeline company recorded in the sample information
Alternative answer most often indicated by these respondents
TOTAL 71%
NGTL 100% TransCanada (47%)
Westcoast Energy 96% Spectra (61%)
Keystone 90% TransCanada (56%)
Trans-Quebec Maritime 90% TransCanada (56%)
Emera Brunswick 86% Don't know (51%)
Foothills 77% TransCanada (45%)
Spectra Energy/ Empress 71% TransCanada (38%)
Kinder Morgan 69% TransCanada (35%)
Alliance 50% Don't know (20%)
Maritimes & Northeast 35% Don't know (26%)
Montreal Pipeline 33% NGTL (48%)
TransCanada 29% Don't know (21%)
Enbridge 23% TransCanada (21%)
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Base: All respondents n=1,200

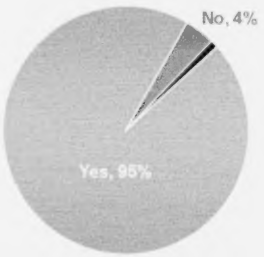
Location of the pipeline on their property

Nearly all respondents report that they know where the pipeline is located on their property (95%), compared with 4% who report that they do not know.

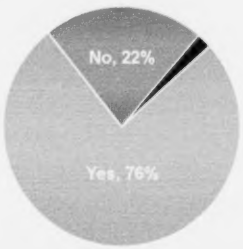
One quarter (76%) of respondents report that they know where the limits of the right of way are located on their property, while one in five (22%) say that they do not know.

Nearly all respondents know where the pipeline is located on their property; three quarters know where the limits of the right of way are

Q6. Do you know where the pipeline is located on your property?



Q7. Do you know where the limits of the right of way are?



Base: All respondents n=1,200

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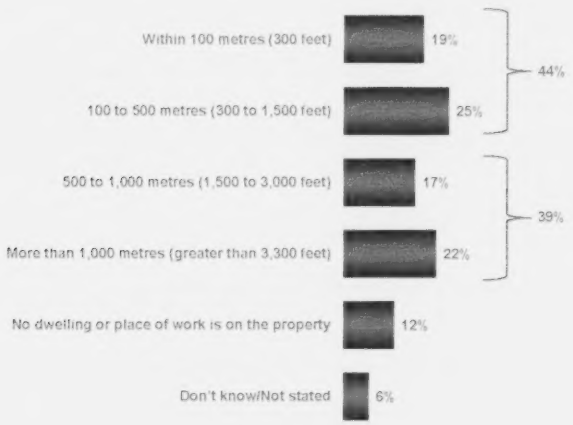
Over four in ten (44%) respondents believes that the pipeline on their property is within 500 metres of the dwelling or place of work on their property. Two in five (39%) believe that the pipeline is farther than 500 metres from the dwelling or place of work on their property. One in ten (12%) report that there is no dwelling or place of work on their property. Few (6%) say that they do not know the location of the pipeline relative to the dwelling or place of work on their property.

Over four in ten respondents say the pipeline is within 500 meters of their property; few don't know how close it is

Q8. Can you tell me how close the pipeline is to the dwelling or place of work on the property?



Base: All respondents n=1,200

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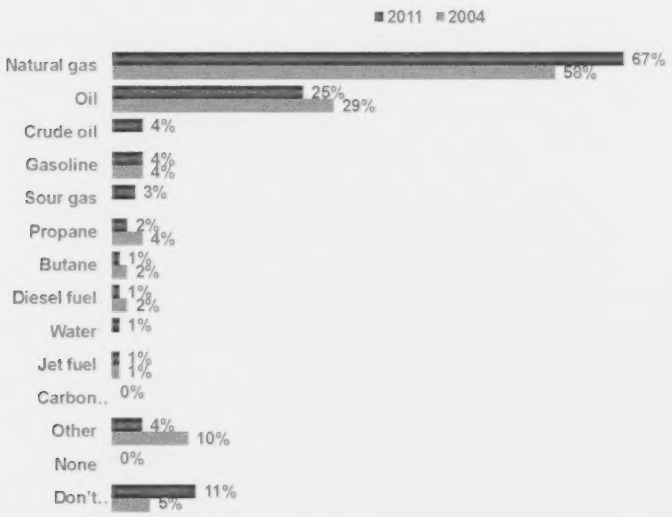
Contents of the pipeline on their property

Two thirds (67%) of respondents report that the product or fuel that flows through the pipeline that crosses their property is natural gas, while one in four (25%) believe that the pipeline contains oil. Other products mentioned include crude oil (4%), gasoline (4%), sour gas (3%), and propane (2%). Small percentages (1% for each) mention butane, diesel fuel, water, and jet fuel. A further 4% mentioned some product other than these, while one in ten (11%) do not know what flows through the pipeline that crosses their property.

Two in three respondents say that natural gas flows through the pipeline on their land; one in four say oil does

Q11. Could you tell me what type of product or fuel flows through the pipeline that crosses your land?



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Base: All respondents n=1,200

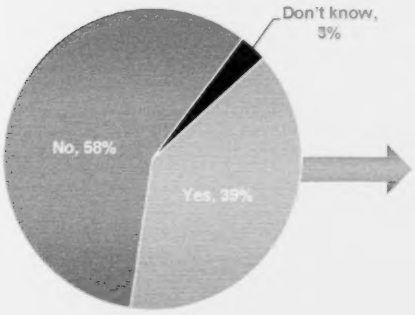
In 2004, a lower proportion of respondents mentioned natural gas (58% vs. 67% this year), while a similar proportion mentioned oil (29% vs. 25% this year).

Nearly three in five say that they were not the original party to the agreement allowing a pipeline on their property

Nearly three in five respondents (58%) say they were not the original party to sign the agreement allowing the pipeline to be built on their property. Two in five (39%) say they were the original party. When these respondents were asked whether they were offered a choice between a lump sum or a periodic payment when approached to negotiate an easement agreement, 49% say that they were offered a choice, 37% say that they were not, while an additional 15% say that they don't know.

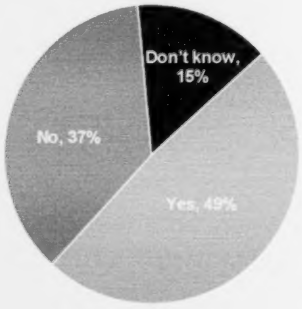
Nearly three in five respondents were not the original party to sign the agreement allowing the pipeline on their property

Q52. Were you the original party to sign the agreement that allowed the pipeline to be built on your property?



Base: All respondents n=1,200

Q53. When you were approached to negotiate an easement agreement were you given the choice between a lump sum or a periodic payment?



Base: Party to the original agreement (n=474)

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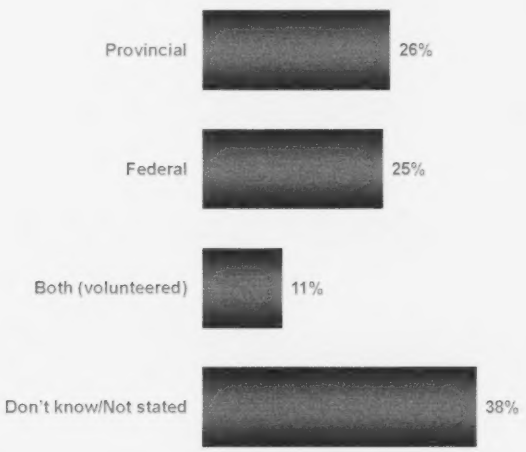
Regulation of the pipeline on their property

Two in five (38%) respondents do not know if the pipeline on their property is regulated by a provincial or federal regulator. A quarter believe that the regulator is provincial (26%) while another quarter believe it is federal (25%); one in ten (11%) believe that the regulation of the pipeline falls under both provincial and federal jurisdictions.

Since we obtained information from pipeline companies for those landowners who we know to own property on which an NEB-regulated pipeline runs, it may also be said that about one in three respondents (36%) correctly say that the pipeline on their property is federally regulated (including the 25% who say federal, and the additional 11% who say it is both federal and provincial), while the remainder either don't know (38%) or say provincial only (26%).

Two in five respondents do not know who regulates the pipeline on their property, one in four think it is the Provincial regulator alone

Q10. Do you know if the pipeline located on your property is regulated by the Provincial or Federal regulator?



Base: All respondents n=1,200

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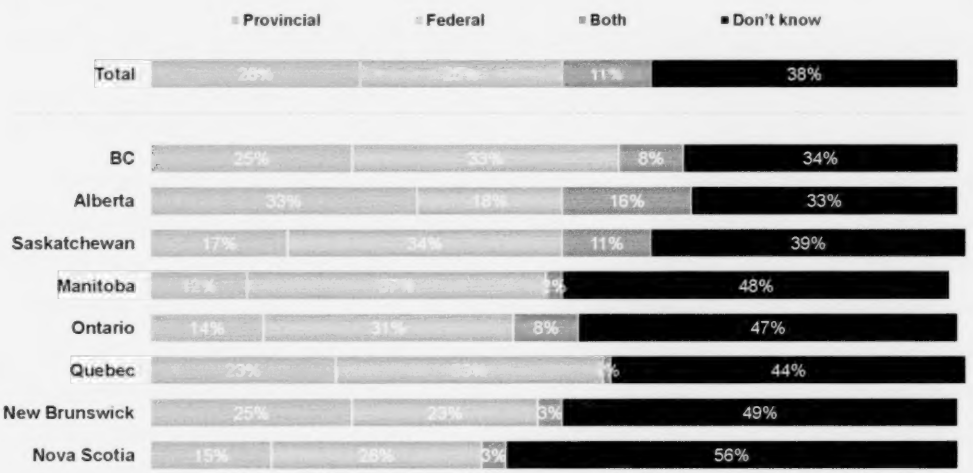
Regionally, respondents from Alberta (33%) are most likely to think the pipeline on their property is regulated by their provincial government, while residents of Manitoba (37%) are most likely to say it is the federal government. Respondents from Nova Scotia (56%) are most likely to say they don't know.

Two in five respondents do not know who regulates the pipeline on their property, one in four think it is the Provincial regulator alone

Q10. Do you know if the pipeline located on your property is regulated by the Provincial or Federal regulator?



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Base: All respondents n=1,200

NGTL respondents are more likely to think the provincial government (only) regulate the pipeline company (37% vs. 26% on average), and are less likely to think that the federal government does (15% vs. 25% on average).

Views on Reclamation

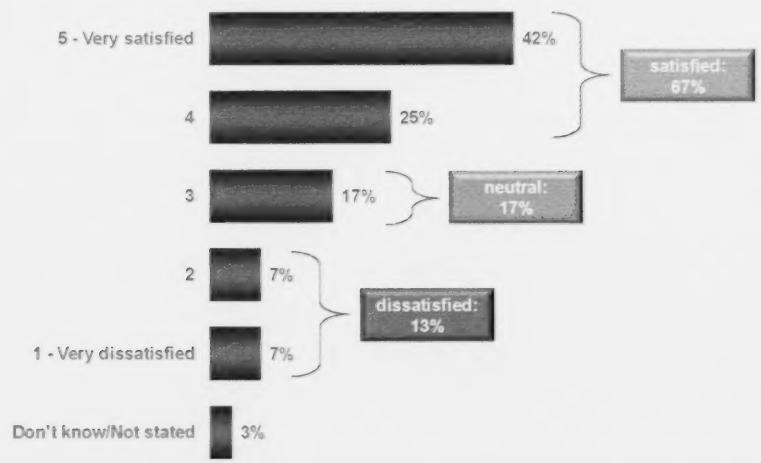
Respondents were queried about their satisfaction with the reclamation of the right-of-way on their property.

Satisfaction with the reclamation

When asked to rate their satisfaction with the reclamation of their right-of-way, two thirds of respondents (67%) reported that they were satisfied, while one in eight (13%) are dissatisfied. Two in five respondents reported being very satisfied (42%), as compared to those who reported being very dissatisfied (7%).

Two thirds of respondents are satisfied with the reclamation of the right of way on their property; one in ten are dissatisfied

Q12. Please rate your satisfaction with the reclamation of your right of way (that is, the land over the pipeline), using a 1-5 scale where '1' means 'very dissatisfied' and '5' means 'very satisfied':



Base: All respondents n=1,200

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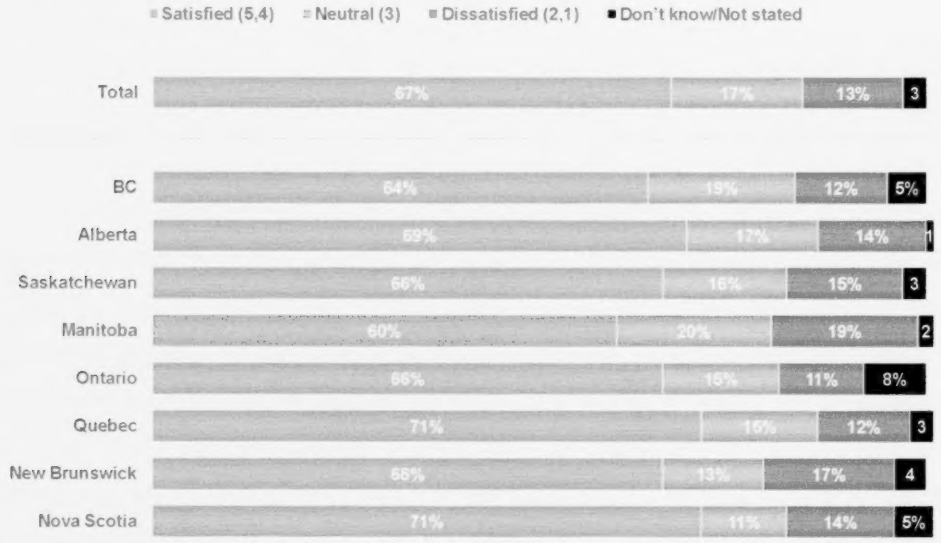
Satisfaction with reclamation of the right-of-way varies little by province, where at least three in five report satisfaction; those who report the least satisfaction are in Manitoba (60%), while those who report the most satisfaction are in Quebec and Nova Scotia (both 71%). Levels of reported dissatisfaction vary from a low of 11% in Ontario to a high of 19% in Manitoba.

Those in Manitoba are least likely to be satisfied with the reclamation of their right of way

Q12. Please rate your satisfaction with the reclamation of your right of way (that is, the land over the pipeline), using a 1-5 scale where '1' means 'very dissatisfied' and '5' means 'very satisfied':



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Base: All respondents n=1,200

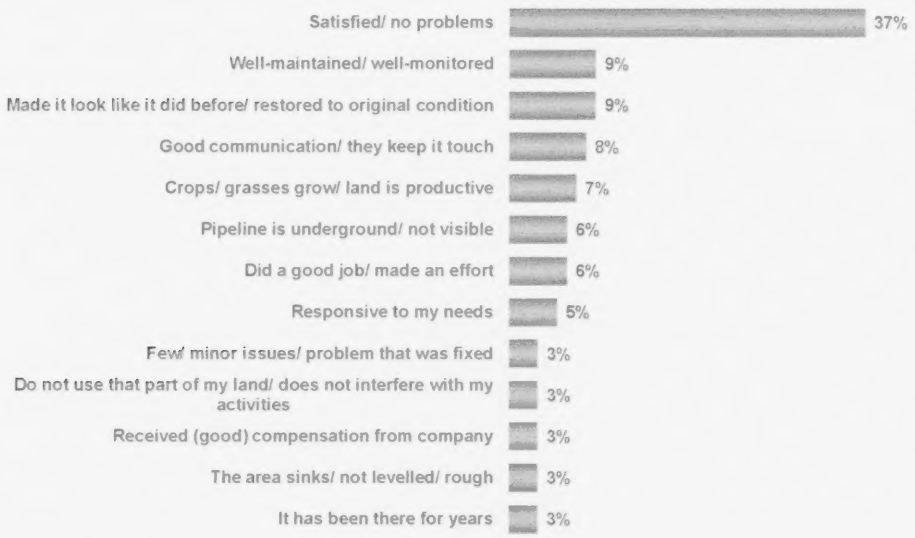
Kinder Morgan (59%) and Alliance landowners (58%) are less satisfied than average with the reclamation of their land.

Reasons for satisfaction with the reclamation

When those respondents who reported satisfaction with the reclamation of the right-of-way on their property were asked why they were satisfied, two fifths (37%) say simply that they were satisfied or had no problems; one in ten say that the reclamation was well-maintained and well-monitored, or that the land had been restored to its original condition (both 9%). Other mentions include good communication (8%), that the land is productive (7%) and that the pipeline is underground and not visible (6%) or that a good job was done (6%).

Two fifths of respondents report having no problems with reclamation of land over the pipeline on their property

Q13. And why would you rate your view as satisfied on the scale of 1 to 5?


Satisfied/ no problems 37%
Well-maintained/ well-monitored 9%
Made it look like it did before/ restored to original condition 9%
Good communication/ they keep it touch 8%
Crops/ grasses grow/ land is productive 7%
Pipeline is underground/ not visible 6%
Did a good job/ made an effort 6%
Responsive to my needs 5%
Few/ minor issues/ problem that was fixed 3%
Do not use that part of my land/ does not interfere with my activities 3%
Received (good) compensation from company 3%
The area sinks/ not levelled/ rough 3%
It has been there for years 3%

All mentions of 3% or above

Base: Those Satisfied with reclamation of land over the pipeline n=800

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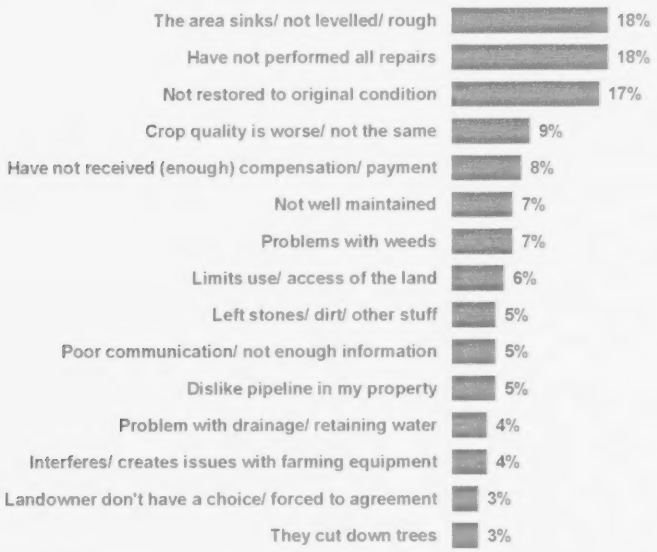
Reasons for dissatisfaction with the reclamation

When those respondents who reported dissatisfaction with the reclamation of the right-of-way on their property were asked why they were dissatisfied, one in five report that the ground had not been levelled off (18%), that not all repairs had been performed (18%), and that the land had not been restored to its original condition (17%). One in ten report that their crop quality has worsened (9%) or that they have not received any or adequate compensation (8%). Other mentions include that the land has not been well-maintained (7%), that they have problems with weeds (7%), and that the reclamation limits the use of their land (6%).

A lack of adequate and proper repair is most often mentioned among those dissatisfied with the reclamation of land on their property

Q13. And why would you rate your view as dissatisfied on the scale of 1 to 5?


The area sinks/ not levelled/ rough 18%
Have not performed all repairs 18%
Not restored to original condition 17%
Crop quality is worse/ not the same 9%
Have not received (enough) compensation/ payment 8%
Not well maintained 7%
Problems with weeds 7%
Limits use/ access of the land 6%
Left stones/ dirt/ other stuff 5%
Poor communication/ not enough information 5%
Dislike pipeline in my property 5%
Problem with drainage/ retaining water 4%
Interferes/ creates issues with farming equipment 4%
Landowner don't have a choice/ forced to agreement 3%
They cut down trees 3%

All mentions of 3% or above

Base: Those dissatisfied with reclamation of land over the pipeline, n=162

Ipsos Reid

Pipeline Safety and Security

Respondents were asked a number of questions related to their perception of safety surrounding the pipelines on their property, including whether or not the company conducts safety checks, their knowledge regarding safety requirements for excavation, how safety concerns regarding the pipeline should be reported, their confidence with regard to specific aspects of pipeline safety, and their level of concern about safety relative to other concerns, such as property values and commercial impacts.

Awareness of pipeline safety checks and excavation requirements

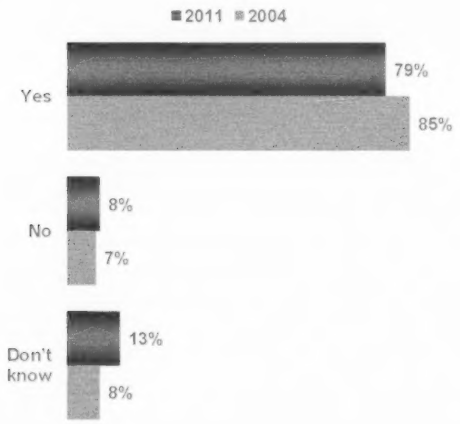
When asked if the pipeline company performs safety checks on the pipeline on their property, four in five respondents (79%) say that safety checks are performed while 8% say they are not. Over one in ten (13%) report that they do not know whether safety checks are performed by the pipeline company.

When asked if they are familiar with the safety requirements for performing excavations near the pipeline on their property, nearly all (92%) report that they are aware of these safety requirements. Less than one in ten (7%) report that they are not aware of the requirements for excavating near the pipeline on their property.

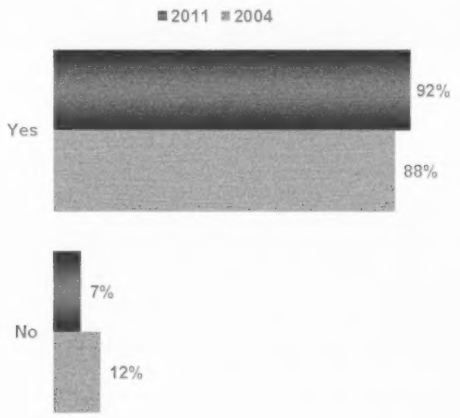
The proportions who say that their pipeline company checks the safety of the pipeline on their property and that they are familiar with the requirements to follow when working near a pipeline have declined since 2004.

Four in five believe that the pipeline company checks the safety of the pipeline on their property; nearly all are aware of the requirements prior to excavation

Q14. To the best of your knowledge, does the pipeline company check the safety of the pipeline on your property?



Q15. Are you familiar with the requirements that have to be followed when you are doing work near a pipeline, such as an excavation or digging a fence post?



Ipsos Reid

Base: All respondents n=1,200

Enbridge landowners (87%) are most likely to say the company checks the safety of the pipeline, while Keystone landowners (65%) are less likely to say this.

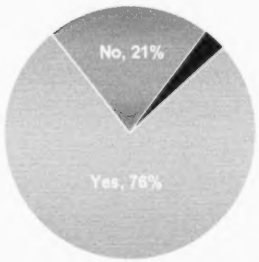
Action required in case of emergency

Respondents were asked if the pipeline company had provided them with information about what to do in the event of an emergency or if they should suspect suspicious activity near the pipeline. Three quarters of respondents (76%) say that the pipeline company provided them with this information, while one in five (21%) say that the pipeline company has not provided them with this information.

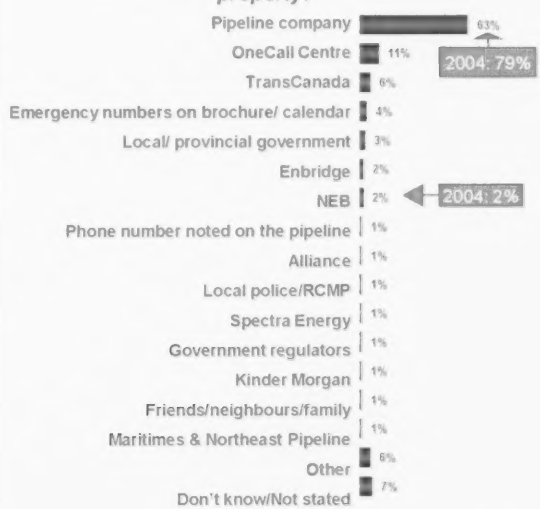
When asked whom they would call if they had any concerns about the pipeline on their property, three in five respondents (63%) say that they would call the pipeline company directly. A further twelve percent identify the pipeline company by name (TransCanada, Enbridge, Alliance, Spectra Energy, Kinder Morgan and Maritimes & Northeast Pipeline), bringing the total of those who would call the pipeline company directly to three quarters (75%). One in ten (11%) report that they would call the OneCall Centre; one in fifty would call the National Energy Board (2%). Nearly one in ten (7%) of respondents report that they do not know who they would call.

Three quarters have received information regarding emergencies from the pipeline company; three fifths would call the pipeline company with concerns

Q17. Has the pipeline company given you any information about what to do in the event of a pipeline emergency or if you suspect suspicious activity near the pipeline?



Q16. Whom would you call if you had concerns about the pipeline on your property?



Ipsos Reid

Base: All respondents n=1,200

Confidence with regard to pipeline safety and its regulation

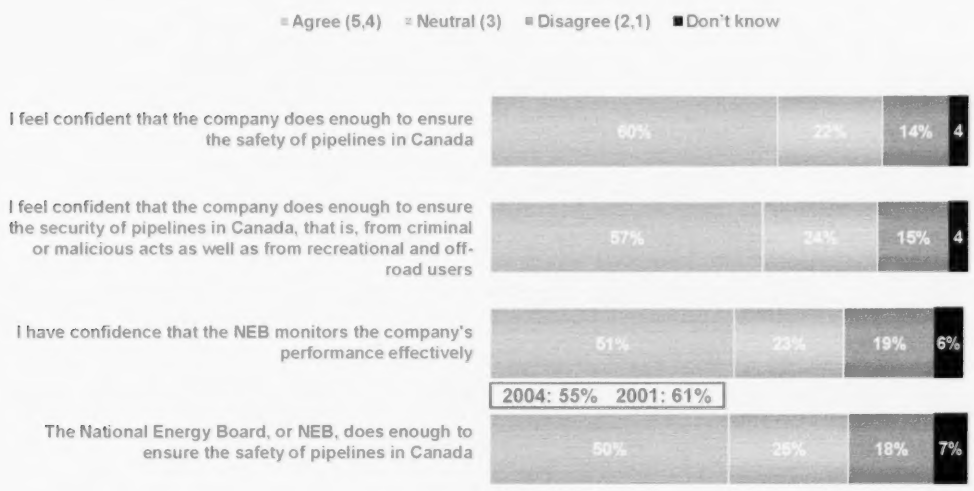
Respondents were asked the extent to which they agreed with four statements about pipeline safety in general and the NEB in particular.

Three in five agree that they feel confident that the pipeline company does enough to ensure the safety of Canada's pipelines (60%) and does enough to ensure the security of Canadian pipelines from criminal and malicious acts or threats from recreational and off-road users (57%). Half of respondents have confidence that the NEB adequately monitors the performance of pipeline companies (51%) and that the NEB does enough to ensure the safety of Canada's pipelines (50%). The percentages of respondents who disagree with these statements range from 14% to 19%, while between 22% and 25% rate their views as neutral.

Confidence that the NEB monitors companies' performance effectively has declined this year (51%) as compared with 2004 (55%) and 2001 (61%).

Majorities feel confident in the pipeline company's and NEB's efforts regarding pipeline safety

Q19. I would now like to ask you some general questions about how you feel about living or working near a pipeline. Please tell me the extent to which you agree with each of the following statements, where '1' means 'strongly disagree' and '5' means 'strongly agree'.


Agree (5,4)
Neutral (3)
Disagree (2,1)
Don't know
I feel confident that the company does enough to ensure the safety of pipelines in Canada
60%
22%
14%
4
I feel confident that the company does enough to ensure the security of pipelines in Canada, that is, from criminal or malicious acts as well as from recreational and off-road users
57%
24%
15%
4
I have confidence that the NEB monitors the company's performance effectively
51%
23%
19%
6%
2004: 55% 2001: 61%
The National Energy Board, or NEB, does enough to ensure the safety of pipelines in Canada
50%
25%
18%
7%

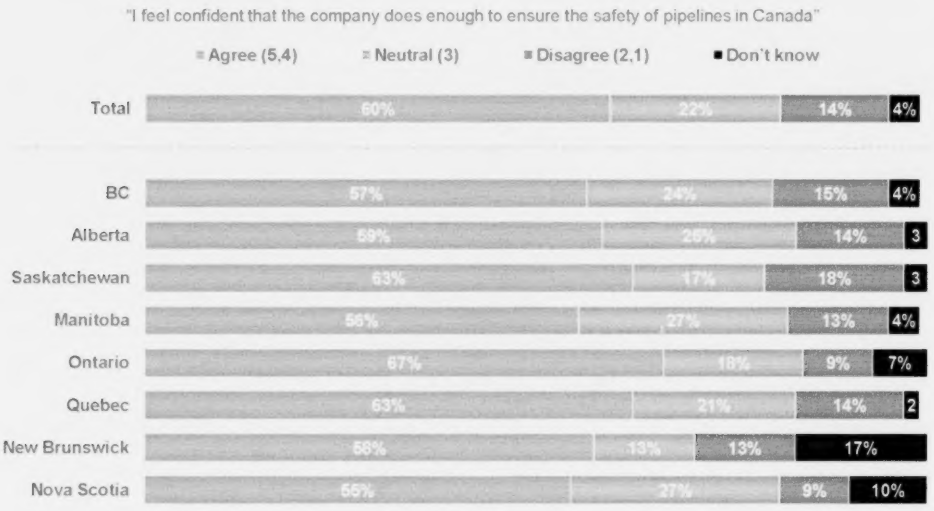
Ipsos Reid

Base: All respondents n=1,200

Looking more closely at perceptions of the pipeline company's efforts to ensure the safety of pipelines in Canada, levels of agreement vary by province, with residents in Ontario expressing the highest level of confidence that the pipeline company adequately ensured pipeline safety (67%), as compared to a low of 56% in Manitoba. Respondents from Ontario are also least likely to disagree with the statement (9%), as compared to 18% in Saskatchewan. Respondents from New Brunswick are most likely to report that they do not know (17%).

Confidence in pipeline safety is highest in Ontario and lowest in Manitoba

Q19. I would now like to ask you some general questions about how you feel about living or working near a pipeline. Please tell me the extent to which you agree with each of the following statements, where '1' means 'strongly disagree' and '5' means 'strongly agree'.



Ipsos Reid

Base: All respondents n=1,200

Spectra (71%) and TransCanada landowners (72%) are more likely to express confidence that the company does enough to ensure the safety of pipelines in Canada, while Alliance landowners (52%) are less confident.

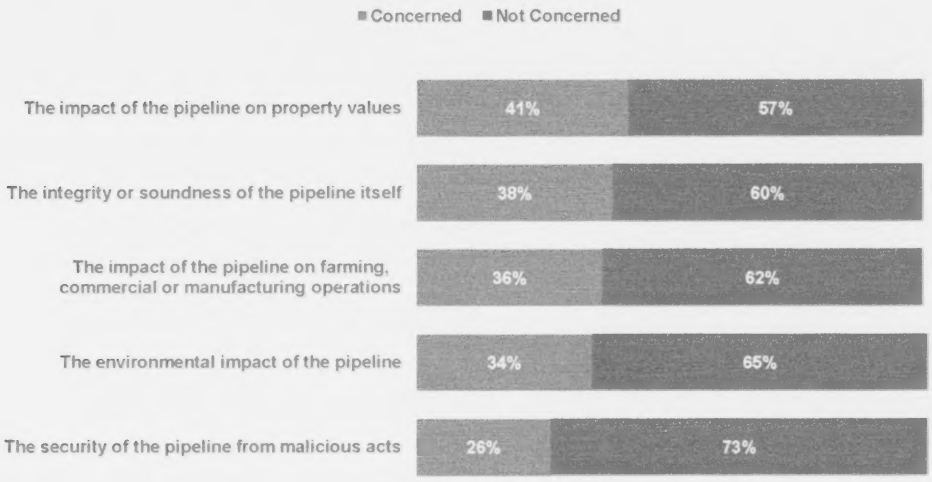
Concerns about various aspects of having a pipeline on one's property

Respondents were asked the extent to which they felt concern about particular aspects of having a pipeline on their property.

Majorities of respondents (ranging from 57% to 73%) say they are either not very or not at all concerned with the various aspects of having a pipeline on their property. Respondents express the highest level of concern with respect to the impact of the pipeline on their property values (41%, including 17% who are very concerned), followed by the impact of the pipeline on farming, commercial or manufacturing operations (38%) and the integrity or soundness of the pipeline itself (36%). One third (34%) of respondents are concerned with the environmental impact of the pipeline, and one quarter (26%) are concerned with the security of the pipeline from malicious acts.

The impact of the pipeline on property values, the integrity of the pipeline, and the impact of the pipeline on farming or commercial uses rate as the top concerns

Q18. How concerned are you with respect to each of the following aspects of having a pipeline on your property. Would you say that you are very concerned, somewhat concerned, not very concerned or not at all concerned?



Ipsos Reid

Base: All respondents n=1,200

Alliance landowners are more concerned than average with respect to the impact of the pipeline on property values (57%) and the impact on farming and commercial activities (43%). Kinder Morgan landowners are more concerned than average with the impact of the pipeline on the environment (43%).

Communications *from* Pipeline Companies

Respondents were asked a number of questions about their contact from their pipeline company, including the frequency of contact, the reason for contact, and their satisfaction with the contact they received. Those who expressed dissatisfaction were asked to give the main reason for their dissatisfaction.

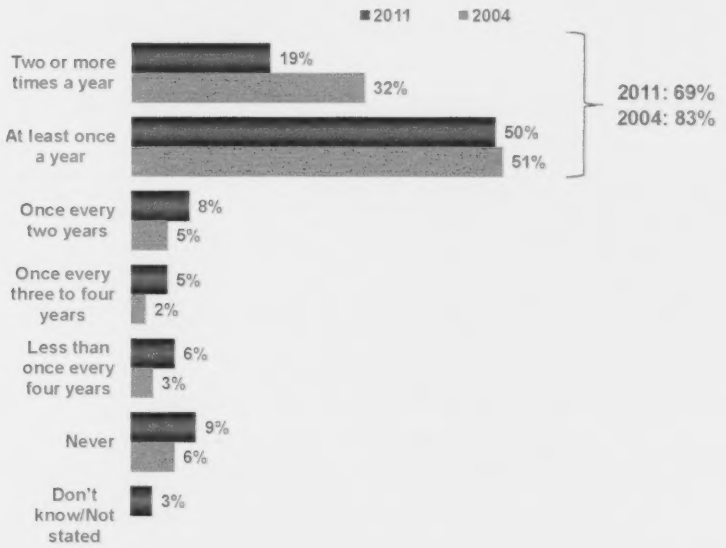
Frequency of contact from company

Seven in ten (69%) respondents receive contact from their pipeline company at least once a year; one in five (19%) are contacted twice or more annually. One in ten (9%) have never received contact from their pipeline company.

The proportion who say the pipeline company has contacted them at least once a year or more often has declined since 2004 (to 69% from 83% in 2004).

Seven in ten respondents are contacted by the pipeline company at least once a year; one in ten report that they have never been contacted

Q20. How often does this company contact you? Is it...



Ipsos Reid

Base: All respondents n=1,200

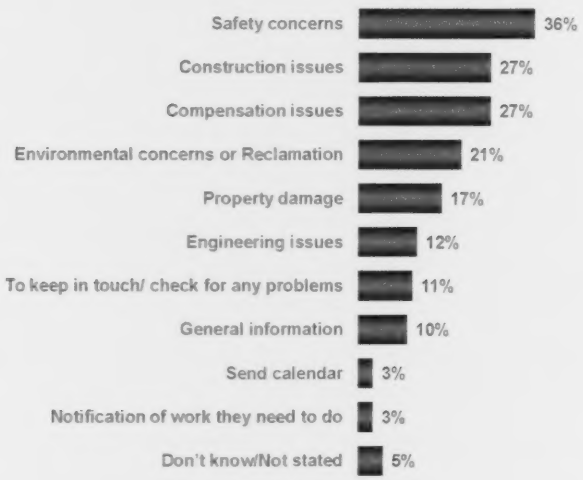
Enbridge (88%), Spectra (85%) and Maritimes and Northeast landowners (85%) are more likely to report contact from their company at least once a year or more, while NGTL landowners (57%) are less likely to say this.

Reasons for contact from company

More than a third (36%) of the contact received from pipeline companies is with regard to safety issues. Other common reasons include construction issues (27%) or compensation issues (27%), as well as environmental concerns or reclamation (21%). Property damage (17%) and engineering issues (12%) are less frequently mentioned.

A third of company contacts concern safety issues; other frequently mentioned reasons include construction and compensation

Q21. Which of the following are reasons the company has contacted you?


Safety concerns 36%
Construction issues 27%
Compensation issues 27%
Environmental concerns or Reclamation 21%
Property damage 17%
Engineering issues 12%
To keep in touch/ check for any problems 11%
General information 10%
Send calendar 3%
Notification of work they need to do 3%
Don't know/Not stated 5%

All mentions of 3% or above

Base: Has been contacted by company n=1,085

Ipsos Reid

Westocoast Energy (46%) and Spectra landowners (43%) are more likely to say the company has contacted them about safety concerns. Keystone landowners (53%) are more likely to say the company has contacted them about construction issues. NGTL landowners (42%) are more likely to say they were contacted about compensation issues.

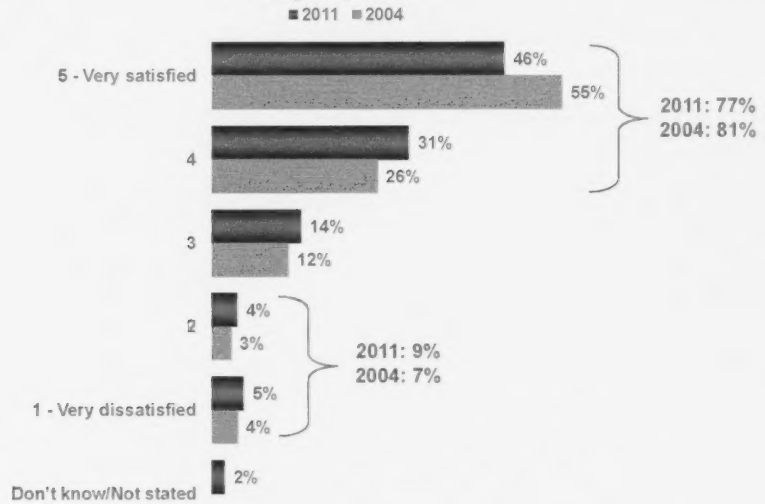
Satisfaction with most recent contact from company

When asked to rate their satisfaction with their most recent contact with the pipeline company, three quarters of respondents (77%) report that they were satisfied, while less than one in ten (8%) are dissatisfied. Nearly half of respondents report being very satisfied (46%), as compared to one in twenty who report being very dissatisfied (5%).

The proportion who are satisfied with the recent contact initiated by the pipeline company has slightly declined from 2004 (77% this year vs. 81% in 2004).

Three quarters are satisfied with the contact they have had with the pipeline company; one in twenty is very dissatisfied

Q22. Thinking of contact initiated by the pipeline company, how satisfied were you with your most recent contact with the company? Please rate your experience, with '1' being 'very dissatisfied' and '5' being 'very satisfied'.



Ipsos Reid

Base: Has been contacted by company n=1,085

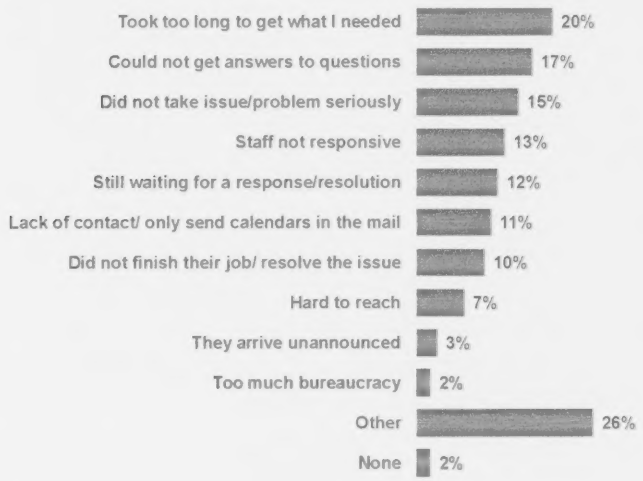
Spectra landowners (88%) are most satisfied with the recent contact from the company, while Alliance landowners (68%) are less satisfied with their recent contact.

Reasons for dissatisfaction with recent company contact

When respondents reporting dissatisfaction with their recent contact with the pipeline company were asked why they were dissatisfied, one in five say that it took too long to get what they needed (20%) or that they could not get answers to their questions (17%). Others say that they did not feel that their issue was taken seriously (15%), that the staff was not responsive (13%), or that they are still waiting for a response or resolution (12%). One in ten (11%) feel that there is a lack of contact with the company, or that they only send calendars in the mail.

Reasons for dissatisfaction included that it took too long to receive what was needed and that answers to questions could not be obtained

Q23. What would you say is the main reason you were dissatisfied with this most recent contact with the company?


Took too long to get what I needed 20%
Could not get answers to questions 17%
Did not take issue/problem seriously 15%
Staff not responsive 13%
Still waiting for a response/resolution 12%
Lack of contact/ only send calendars in the mail 11%
Did not finish their job/ resolve the issue 10%
Hard to reach 7%
They arrive unannounced 3%
Too much bureaucracy 2%
Other 26%
None 2%

Ipsos Reid

Base: Dissatisfied by the most recent contact with the company n=88

One in four respondents mentioned something "other" than one of the coded results (indicating fairly unique concerns mentioned by fewer than 1% of respondents). Typical" comments among the other responses include mentions that the companies have not provided enough warning when they were going to do work on the property, that there has not been enough contact or that it had nothing to do with the contact, but with their compensation as landowners.

Communications *to* Pipeline Companies

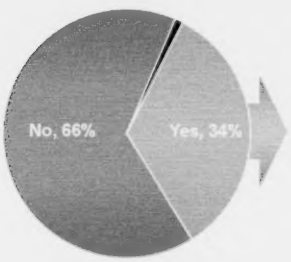
Respondents were asked if they have contacted the pipeline company in the past five years and the reason for the contact. They were asked to rate their satisfaction with the accessibility, responsiveness, and overall manner of the company. Those who expressed dissatisfaction were asked to give the main reason for their dissatisfaction with the treatment they received from the company.

Contacting the pipeline company

A third of respondents (34%) have contacted the pipeline company themselves in the last five years. The most frequent reason for contacting the pipeline is with regard to construction issues (42%) and compensation issues (29%), followed by environmental concerns or reclamation (23%), property damage (22%), or safety concerns (19%).

A third have contacted the pipeline company in the last five years, most frequently regarding construction and compensation issues

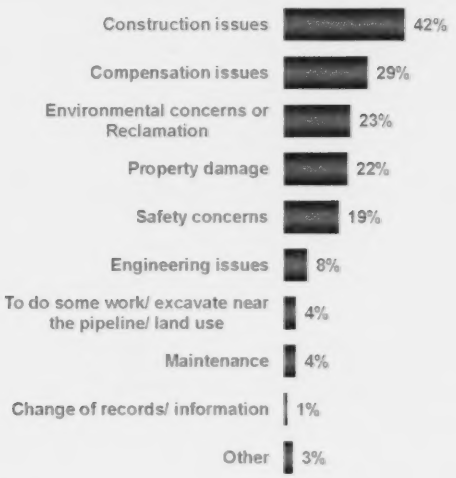
Q24. In the past 5 years have you contacted the pipeline company for any reason?



2004: 34%

Base: All respondents n=1,200

Q25. Which of the following best describes why you contacted the company?


Construction issues 42%
Compensation issues 29%
Environmental concerns or Reclamation 23%
Property damage 22%
Safety concerns 19%
Engineering issues 8%
To do some work/ excavate near the pipeline/ land use 4%
Maintenance 4%
Change of records/ information 1%
Other 3%

Base: Has contacted company n=401

Ipsos Reid

Westcoast Energy (45%) and Foothills landowners (42%) are more likely than average to say they have contacted these pipeline companies in the past five years.

Satisfaction with contacting the pipeline company

When asked to rate their satisfaction with the service they experienced in their most recent contact with the pipeline company, three quarters of respondents report that they

were satisfied with the accessibility of the company (75%), the overall way in which they were treated by the company (75%) and the amount of time it took to make contact with the company (72%). About one in six respondents (15% to 16%) express dissatisfaction with their experience contacting the pipeline company in each of these respects.

Satisfaction with communications with pipeline companies

Q26. How satisfied were you with your most recent communication with the company about this issue in terms of the following, with '1' meaning 'very dissatisfied' and '5' meaning 'very satisfied'.

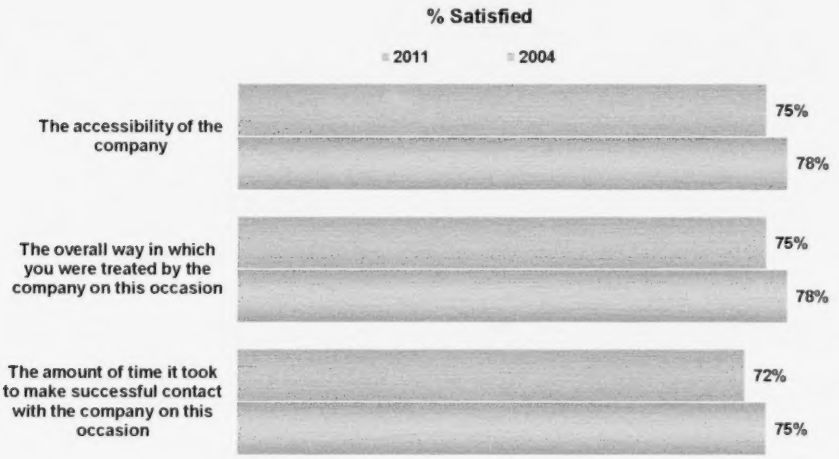
Base: Has contacted company n=401

Ipsos Reid

Satisfaction with the tested aspects of communications with pipeline companies are largely consistent with the 2004 findings.

Satisfaction with communications with pipeline companies

Q26. How satisfied were you with your most recent communication with the company about this issue in terms of the following, with '1' meaning 'very dissatisfied' and '5' meaning 'very satisfied'.



Base: Has contacted company n=401

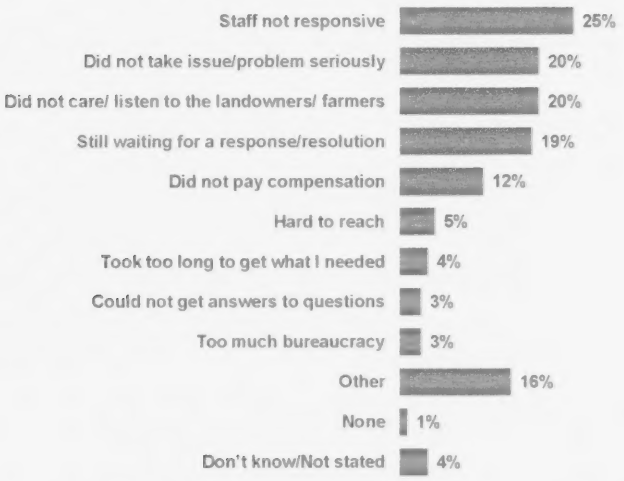
Ipsos Reid

Reasons for dissatisfaction with recent pipeline company contact

When the 16% of respondents who reported dissatisfaction with the overall way they were treated by the pipeline company were asked why they were dissatisfied, one in four (25%) report that the staff was not responsive, while one in five report that they did not feel that their issue was taken seriously (20%), that the company didn't care for or listen to the landowners (20%), or that they are still waiting for a response or resolution (19%).

Reasons for dissatisfaction included responsiveness of staff, not feeling taken seriously, and the perception of being heard

Q27. What would you say is the main reason you were dissatisfied with the way you were treated by the company?


Staff not responsive 25%
Did not take issue/problem seriously 20%
Did not care/ listen to the landowners/ farmers 20%
Still waiting for a response/resolution 19%
Did not pay compensation 12%
Hard to reach 5%
Took too long to get what I needed 4%
Could not get answers to questions 3%
Too much bureaucracy 3%
Other 16%
None 1%
Don't know/Not stated 4%

Base: Dissatisfied with treatment n=70

Ipsos Reid

Communication with the NEB

Respondents were asked if they have contacted the NEB in the past five years and the reason for the contact. The few landowners (5% or n=52 respondents) who had contacted the NEB were asked to rate their satisfaction with the accessibility, responsiveness, and overall manner of the company, and queried as to their level of agreement with different statements of service attributes. Finally, they were asked how frequently they would like contact with the NEB.

Contacting the NEB and reasons why

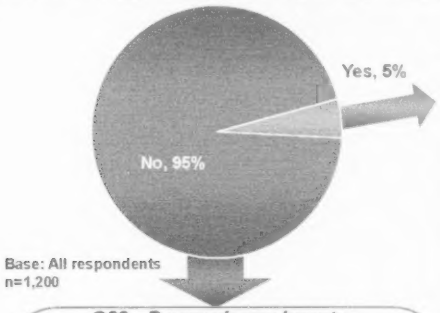
Respondents were asked if they had contacted the NEB for any reason in the past five years. Only one in twenty (5%) have contacted the NEB. Those who had not contacted the NEB were asked if they would know how to contact the NEB if necessary; just over half (53%) say that they would know how to contact the NEB.

The most common reasons for contacting the NEB are with regard to construction (24%) and to make a complaint (23%). Other common reasons are with regard to compensation (14%) or to get information (14%).

Of those who have contacted the NEB in the last five years, say they most commonly used the telephone (71%). One in five says they used a letter or fax to contact the NEB (22%).

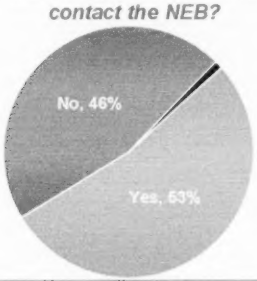
Few respondents say they have contacted the NEB in the past five years

Q28. In the past 5 years have you contacted the National Energy Board, or NEB, for any reason?



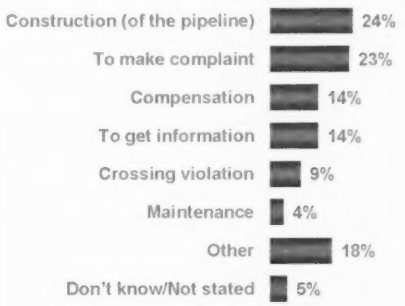
Base: All respondents n=1,200

Q29. Do you know how to contact the NEB?



Base: Has not contacted NEB n=1,148

Q30. For what purpose have you contacted the NEB?



Q31. How did you contact the NEB on this most recent occasion?

	2011	2004
Telephone	71%	66%
By letter/fax	22%	N/A
In-person	7%	54%
E-mail	2%	12%
Website	2%	12%
Other	12%	N/A
Don't know/Not stated	2%	N/A

Base: Has contacted NEB n=52

Ipsos Reid

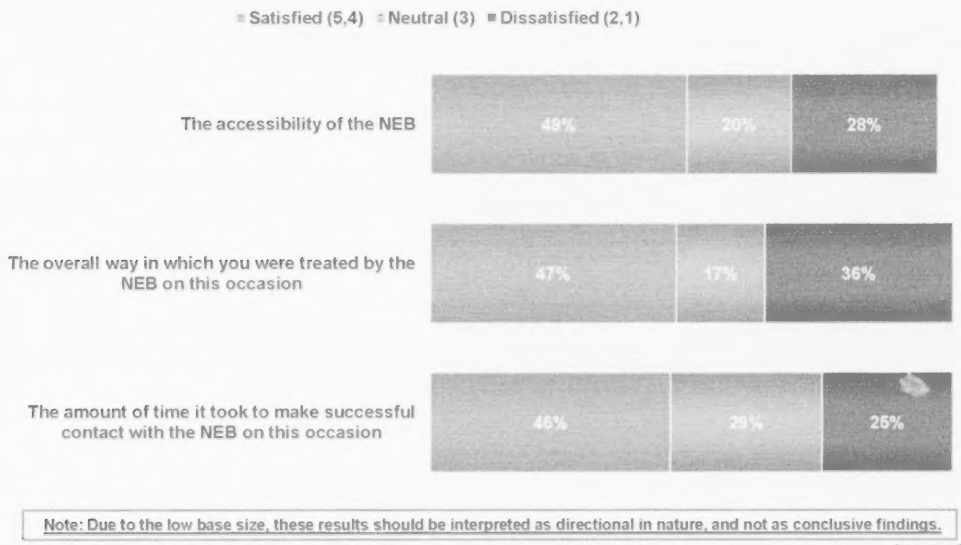
Alliance landowners were more likely than average to say they have contacted the NEB (7%) and to say that they know how to do so (68%).

Satisfaction with contacting the NEB

The 5% of landowners who had contacted the NEB in the past five years (52 respondents) were asked to rate their satisfaction with the service they experienced during their most recent contact with the NEB. On this basis, about half of these respondents report that they were satisfied with the accessibility of the NEB (49%), the overall way in which they were treated by the NEB (47%) and the amount of time it took to make contact with the NEB (46%). Just over one in three (36%) say that they were dissatisfied with the overall way in which they were treated, while about one four say that they were dissatisfied with the accessibility of the NEB (28%) and the amount of time it took to make successful contact with the NEB (25%).

Among the 5% who have contacted the NEB, about half are satisfied with their interaction with the NEB

Q32. How satisfied were you with this most recent communication with the NEB in terms of the following, with '1' meaning 'very dissatisfied' and '5' meaning 'very satisfied'.



Note: Due to the low base size, these results should be interpreted as directional in nature, and not as conclusive findings.

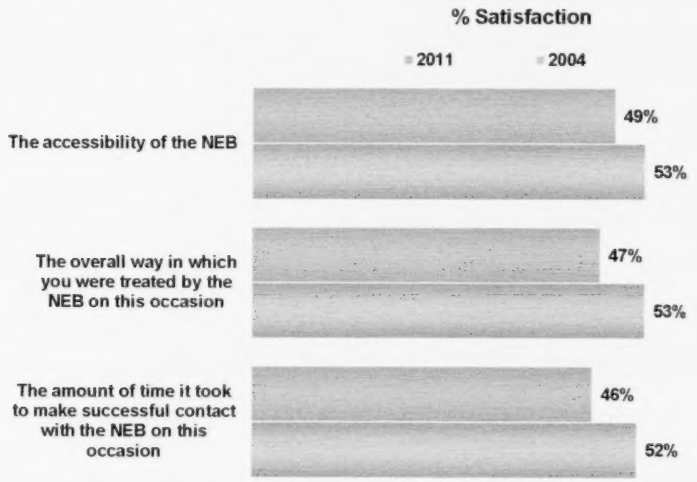
Base: Has contacted NEB n=52

Ipsos Reid

The chart below compares the 2004 results with the 2011 results, although due to the low base size it is not possible to draw any conclusions based on these comparisons.

Tracking satisfaction with interactions with the NEB

Q32. How satisfied were you with this most recent communication with the NEB in terms of the following, with '1' meaning 'very dissatisfied' and '5' meaning 'very satisfied'.



Note: Due to the low base size, these results should be interpreted as directional in nature, and not as conclusive findings.

Base: Has contacted NEB n=52

Ipsos Reid

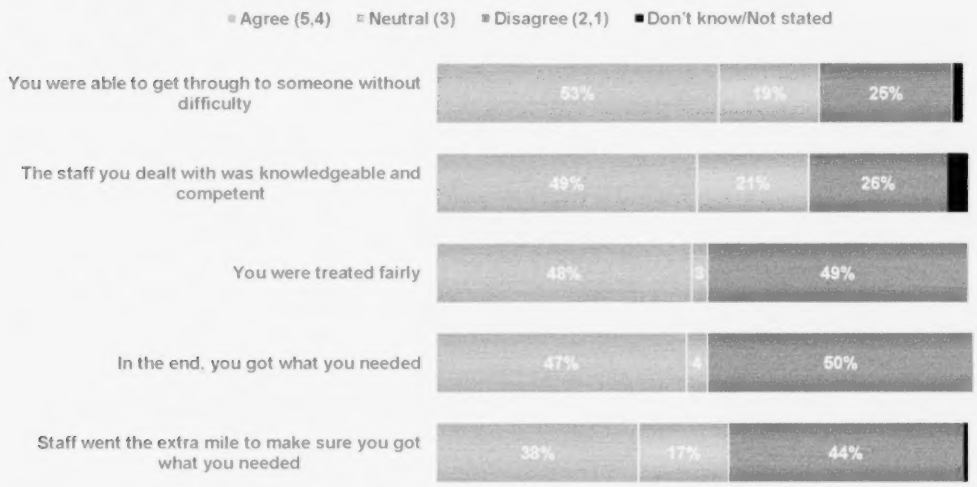
Satisfaction with the service experience from the NEB

The 5% of landowners who contacted the NEB (n=52) were also asked whether they agreed or disagree with several statements about the service they received from the NEB. Just over half of these respondents agree that they were able to get through to someone at the NEB without difficulty (53%). Half agree that they staff they dealt with were knowledgeable and competent (49%), that they were treated fairly (48%) and that they got what they needed in the end (47%). Two in five respondents (38%) agree that the staff at NEB went the extra mile to ensure that they got what they needed.

Those who contacted the NEB most often disagree that they got what they needed (50%), that they were treated fairly (49%) and that staff went an extra mile to ensure that they got what they needed (44%). About one in four disagree that the staff they dealt with were knowledgeable and competent (26%) and disagree that they were able to get through to someone without difficulty (25%).

Satisfaction with most recent experience with the NEB (among the 5% who have contacted the NEB)

Q33. Thinking now about this recent contact with the NEB, please tell me the extent to which you agree with each of the following statements, where '1' means 'strongly disagree' and '5' means 'strongly agree'.



Note: Due to the low base size, these results should be interpreted as directional in nature, and not as conclusive findings.

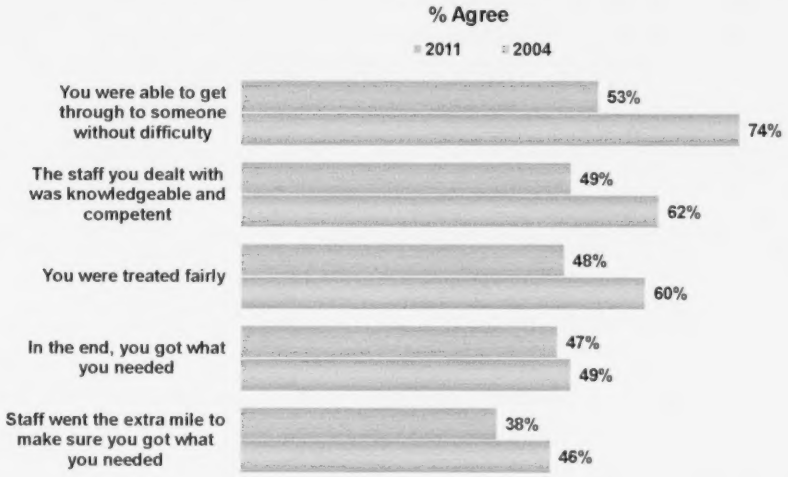
Ipsos Reid

Base: Has contacted NEB n=52

The chart below compares the 2004 results with the 2011 results, although due to the low base size it is not possible to draw any conclusions based on these comparisons.

Tracking satisfaction with most recent experience with the NEB (among the 5% who have contacted the NEB)

Q33. Thinking now about this recent contact with the NEB, please tell me the extent to which you agree with each of the following statements, where '1' means 'strongly disagree' and '5' means 'strongly agree'.



Note: Due to the low base size, these results should be interpreted as directional in nature, and not as conclusive findings.

Base: Has contacted NEB n=52

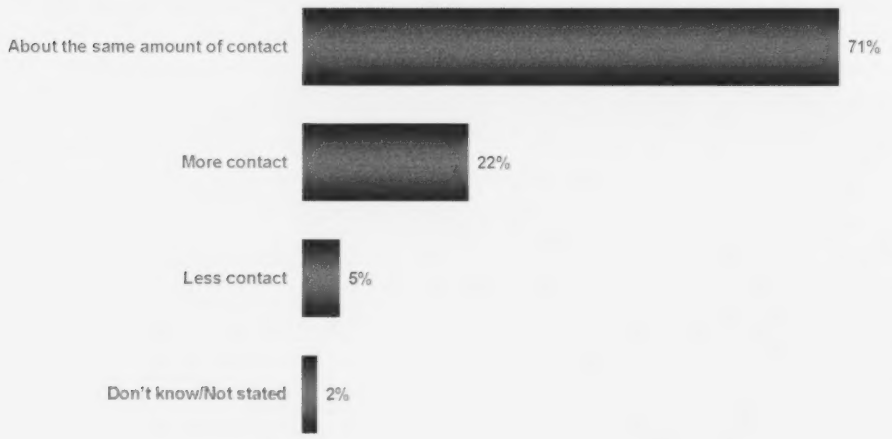
Ipsos Reid

Desired frequency of contact with the NEB

All respondents were asked if they would like to have more contact, less contact, or about the same amount of contact with the NEB. Seven in ten (71%) say that they would like about the same amount of contact from the NEB; one in five (22%) would like more contact, while one in twenty (5%) would prefer less contact.

Seven in ten are content with the current level of contact they have with the NEB; one in five would like more contact

Q38. Generally speaking would you want to have more contact with the NEB, less contact or about the same amount of contact?



Ipsos Reid

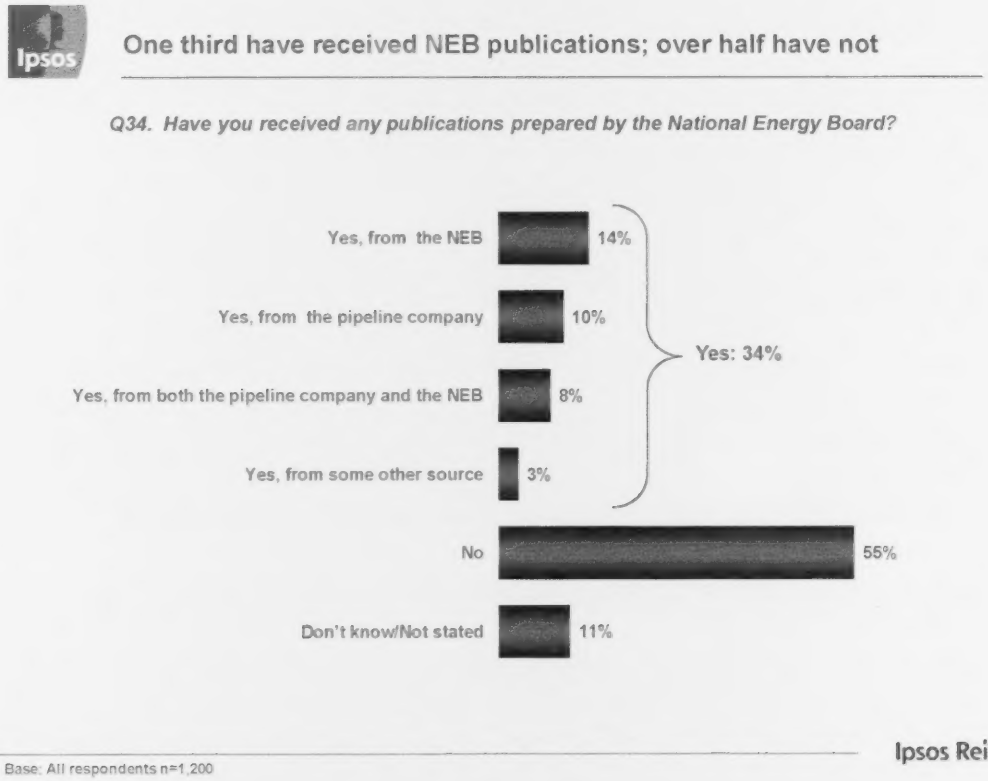
Base: All respondents n=1,200

NEB Publications

Respondents were asked if and from where they had received any publication material prepared by the NEB. Those who had seen NEB publications were asked what type of information the material contained, and if they were satisfied with the content of this material. They were then queried as to their level of agreement with different statements about the publications they had received.

Exposure to NEB publications

Respondents were asked if they have received any publications prepared by the NEB. Over half (55%) have never received any NEB publications. A third of respondents (34%) have received NEB publications, which came from a variety of sources. One in seven (14%) say they have received NEB publications directly from the NEB, while one in ten (10%) say they have received NEB literature from their pipeline company. Some respondents had received NEB publications from both their pipeline company and the NEB (8%), while a small percentage (3%) received these publications from another source.



NGTL (45%), Alliance (42%), Keystone (50%), as well as respondents from Saskatchewan (45%) are more likely to say they have received NEB publications.

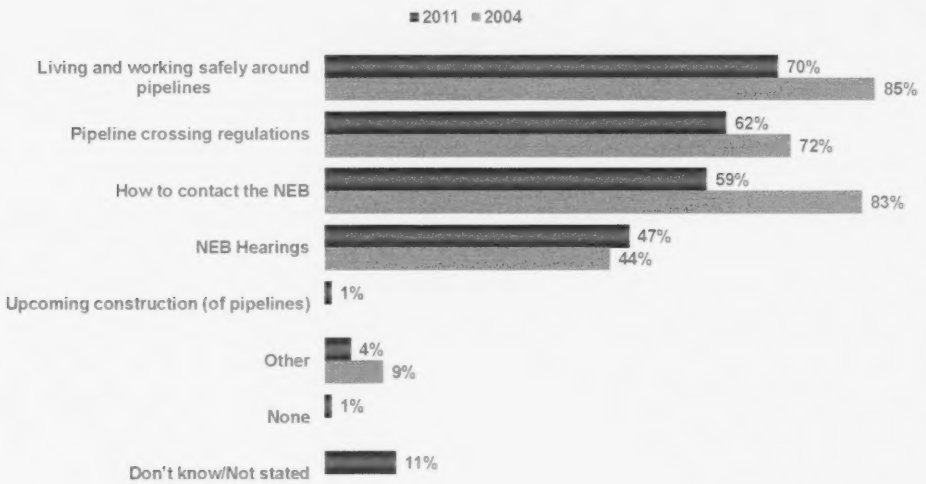
Topics covered in NEB publications

Those who had received publications prepared by the NEB were asked which topics were covered in the publications they saw. These respondents most often say that the publication contained something related to safely living and working around pipelines (70%). Three in five respondents say that they saw something about regulations related to crossing pipelines (62%) or how to contact the NEB (59%). Nearly half of respondents (47%) say that the publication provided information about upcoming NEB hearings.

Compared with 2004, respondents are less likely to say they received NEB publications on the topics of living and working around pipelines, pipeline crossing regulations or how to contact the NEB.

NEB publications received often relate to pipeline safety, crossing regulations, and how to initiate contact with the NEB

Q35. Which of the following topics are covered in the NEB publications you have received?



Base: Has received NEB publications n=369

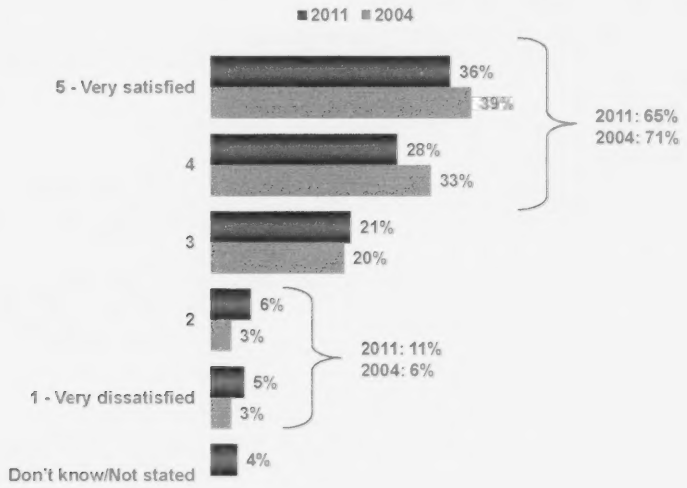
Ipsos Reid

Satisfaction with NEB publications

When asked to rate their satisfaction with the information they had received from the NEB, two thirds of respondents (65%) express satisfaction with the information they received, while one in ten (11%) express dissatisfaction. Over a third of respondents report being very satisfied (36%), as compared to one in twenty who report being very dissatisfied (5%). The level of satisfaction with NEB publications is slightly lower than was found in 2004 (71% vs. 65% this year).

Two thirds of those who received NEB publications are satisfied with the information they received

Q36. Overall, how satisfied were you with the NEB information you received? Please rate this information, with '1' being 'very dissatisfied' and '5' being 'very satisfied'.



Ipsos Reid

Base: Has received NEB publications n=369

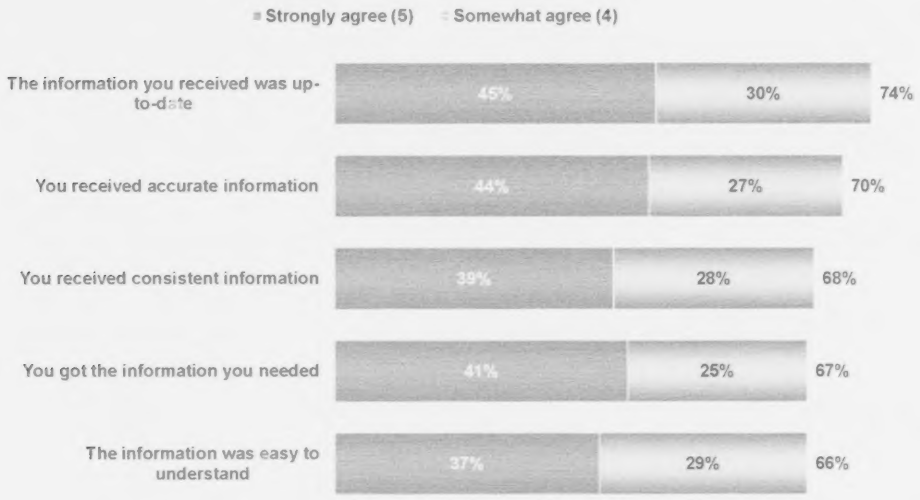
Spectra landowners (91%) are much more likely to be satisfied with the information they received from the NEB than average.

Satisfaction with specific aspects of NEB publications

Respondents were asked to what extent they agreed with statements about the NEB information they received. At least two thirds of respondents agree with each statement, including that the information they received was up-to-date (74%), the information was accurate (70%), the information was consistent (68%), that they received the information they needed (67%) and that the information was easy to understand (66%). *Disagreement* with these statements ranges from a high of 11% who disagree that the information they received was consistent, to just 5% who disagree that the information they received was up-to-date.

Majorities agree that the NEB information they received was up-to-date, accurate, consistent and easy to understand

Q37. Thinking more specifically about the NEB information you have received, please tell me the extent to which you agree with each of the following statements, where '1' means 'strongly disagree' and '5' means 'strongly agree'.



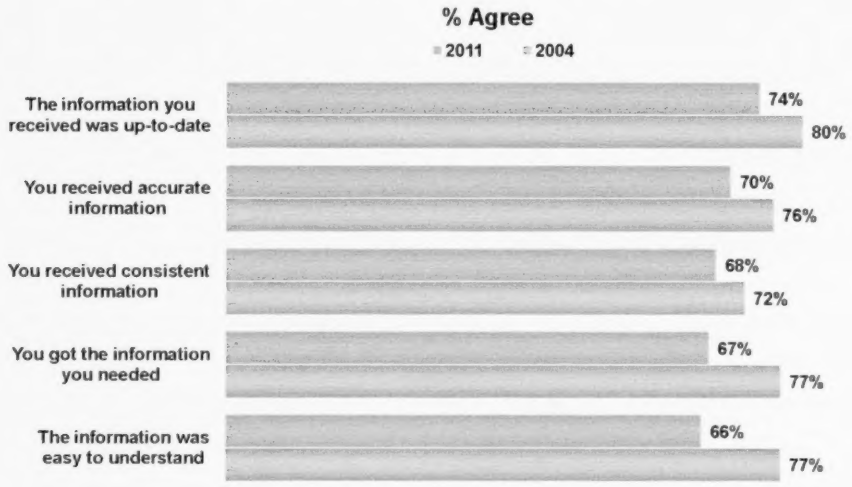
Ipsos Reid

Base: Has received NEB publications n=369

Levels of agreement this year are lower than in 2004 with respect to each of the statements.

Majorities agree that the NEB information they received was up-to-date, accurate, consistent and easy to understand

Q37. Thinking more specifically about the NEB information you have received, please tell me the extent to which you agree with each of the following statements, where '1' means 'strongly disagree' and '5' means 'strongly agree'.



Base: Has received NEB publications n=369

Ipsos Reid

NEB Events

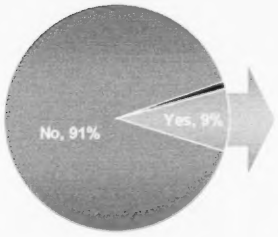
Landowners were asked whether they had ever attended an event conducted by the NEB, and, if so, what type of event they attended. Those who had attended an event were asked how they became aware of the event, what motivated them to participate in it, and how satisfied they were with various aspects of the event they attended. Those who have not attended an NEB event were asked whether they were ever aware of an event which they did not attend, and, if so, why they did not do so.

Participation in NEB events

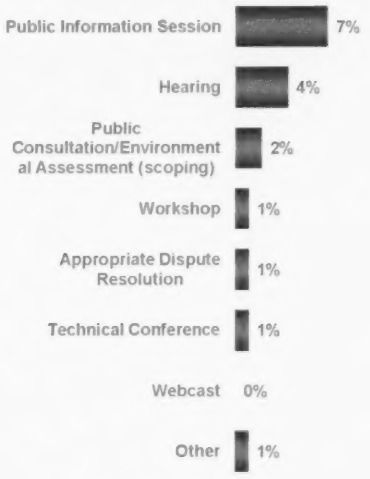
One in ten landowners (9%) say that they have attended an event conducted by the NEB, while 91% say that they have not (a result consistent with 2004). The 9% who have attended an event were asked which of several types of events they had attended. Among all landowners, seven percent say that they attended a public information session, while four percent say that they attended a hearing. Two percent says that they attended a public consultation or environmental assessment; while one percent says they have attended either a workshop, an appropriate dispute resolution or a technical conference.

One in ten have attended an NEB event; those who have most often attended a public information session or a hearing

Q45. Have you ever attended an event conducted by the NEB?



Q46. Which of the following types of events have you participated in?



Ipsos Reid

Base: All respondents n=1,200

Keystone landowners (23%) are much more likely to say they have attended an NEB event than average.

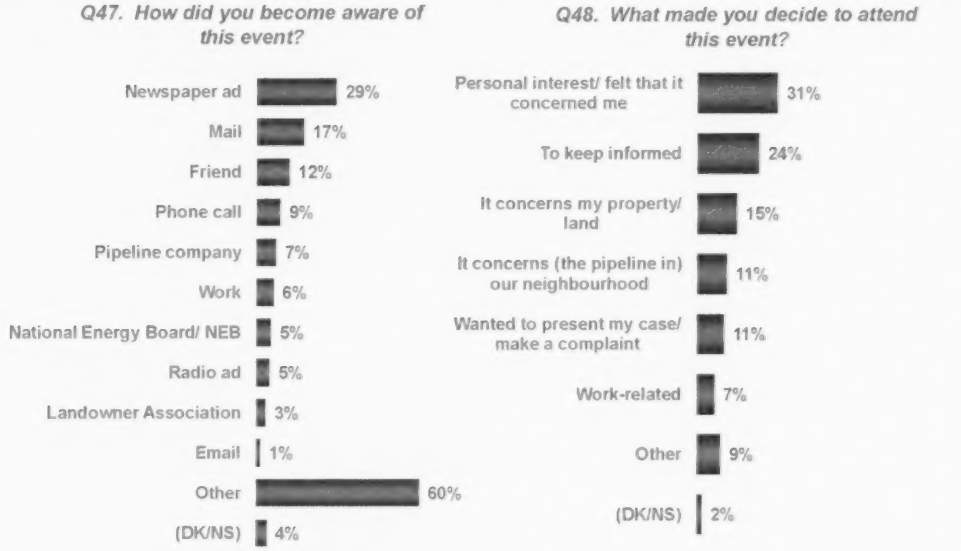
Source of awareness and reason for attending NEB event

The 9% of landowners who have attended an NEB event were asked, for each type of event attended, how they became aware of the event and what made them decide to attend. The results below indicate the aggregate mentions across the different types of events.

In terms of how they became aware of the event, those who attended an event most commonly mention newspaper ads (29% of mentions), followed by mail (17%) and a friend (12%). Other sources of awareness include phone calls (9%), notification by a pipeline company (7%), or hearing something at work (6%).

When asked why they decided to attend, personal interest or a sense of personal concern is most commonly mentioned (31%), followed by a desire to keep informed (24%), and because it concerns their property or land (15%). Others say that it was because it concerns their neighbourhood (11%) or because they wanted to make a complaint (11%). Less than one in ten mentions had something to do with work (7%).

Newspaper ads are most often how respondents became aware of an NEB event; they most often attended out of personal interest


Q47. How did you become aware of this event?
Newspaper ad 29%
Mail 17%
Friend 12%
Phone call 9%
Pipeline company 7%
Work 6%
National Energy Board/ NEB 5%
Radio ad 5%
Landowner Association 3%
Email 1%
Other 60%
(DK/NS) 4%
Q48. What made you decide to attend this event?
Personal interest/ felt that it concerned me 31%
To keep informed 24%
It concerns my property/ land 15%
It concerns (the pipeline in) our neighbourhood 11%
Wanted to present my case/ make a complaint 11%
Work-related 7%
Other 9%
(DK/NS) 2%

Base: Has attended NEB event n=97

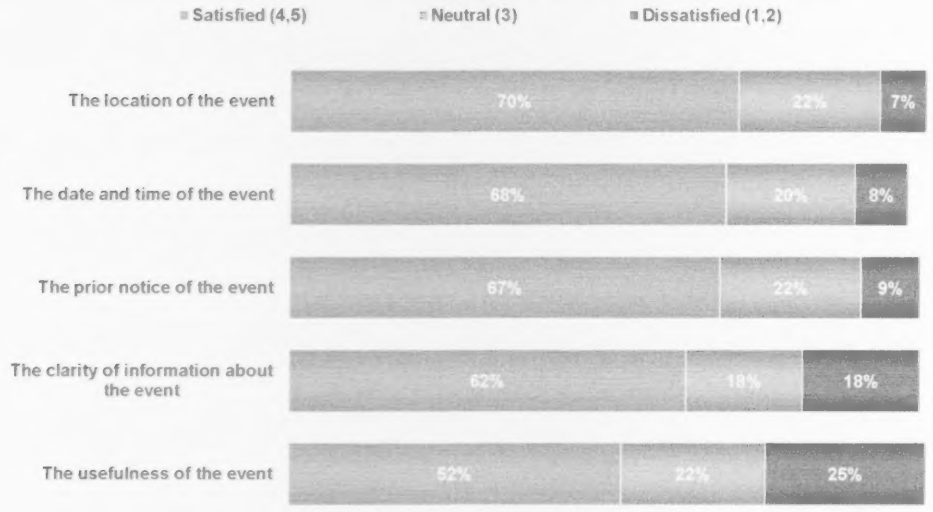
Ipsos Reid

Satisfaction with various aspects of the NEB event they attended

Those who attended an event were asked to rate their satisfaction with various aspects of the event, with respect to each type of event that they attended. In the aggregate, about seven in ten respondents express satisfaction with the location of the event (70%), the date and time of the event (68%) and the prior notice of the event (67%). Three in five (62%) express satisfaction with the clarity of information about the event, while one in five, (18%) express dissatisfaction in this regard. About half (52%) say that they were satisfied with the usefulness of the event, while one in four (25%) say that they were dissatisfied in this regard.

Majorities were satisfied with the NEB event they attended; satisfaction was lowest with the perceived usefulness of the event

Q49. Overall how satisfied were you with the following aspects of the NEB event? Please rate your view on a scale of 1 to 5, where '1' means 'very dissatisfied' and '5' means 'very satisfied'.



Ipsos Reid

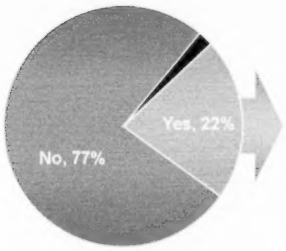
Base: Has attended NEB event n=97

Reasons for not attending an NEB event

One in five respondents (22%) say they have been aware of an NEB event in the past which they have not attended. These respondents were asked why they did not attend. Most often they said they simply had no time or were too busy (33%).

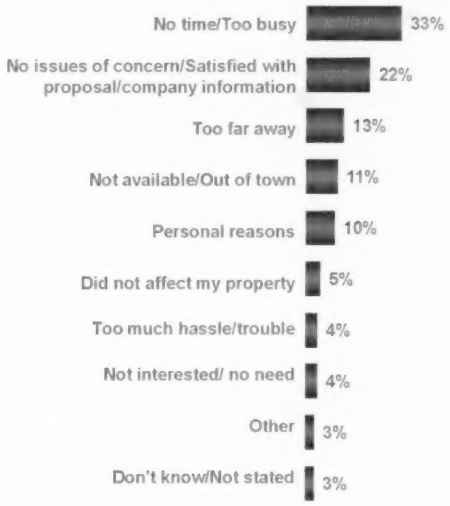
One in five were aware of NEB events, but chose not to attend; they often said that they were too busy, or had no issues of concern

Q50. Have you ever been aware of an event conducted by the NEB which you did not attend?



Base: All respondents n=1,200

Q51. Why didn't you attend this event?


No time/Too busy 33%
No issues of concern/Satisfied with proposal/company information 22%
Too far away 13%
Not available/Out of town 11%
Personal reasons 10%
Did not affect my property 5%
Too much hassle/trouble 4%
Not interested/ no need 4%
Other 3%
Don't know/Not stated 3%

All mentions of 3% or above

Base: Aware of NEB event, but did not attend n=242

Ipsos Reid

NEB Website

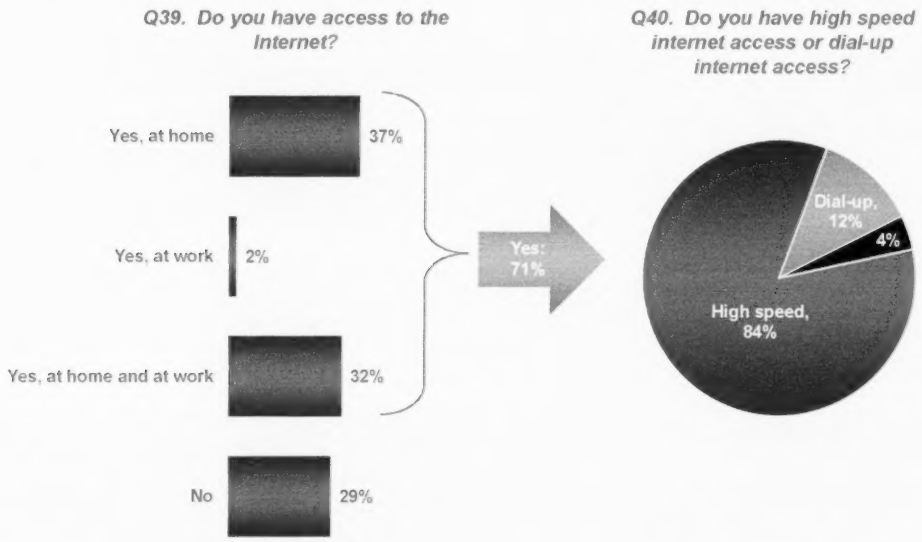
Landowners were asked whether or not they have internet access, and if so, how often, if at all, they have visited the NEB's website. The few respondents (3%, or n=37 respondents) who had visited the NEB's website were asked follow-up questions about their satisfaction with the experience overall and in terms of particular aspects. Please note that given the low number of respondents who have visited the NEB website, these findings should be interpreted as directional in nature.

Internet access

Respondents were asked if they have internet access and where. Seven in ten (71%) respondents have internet access, be it at home (37%), at work (2%), or at both home and work (32%). Three in ten respondents do not have internet access (29%).

Of those who have internet access, four fifths (84%) have high-speed internet connections, while one in ten (12%) have dial-up access.

One third do not have internet access; among those who do, most have high speed internet access



Base: All respondents n=1,200

Base: Has internet access n=846

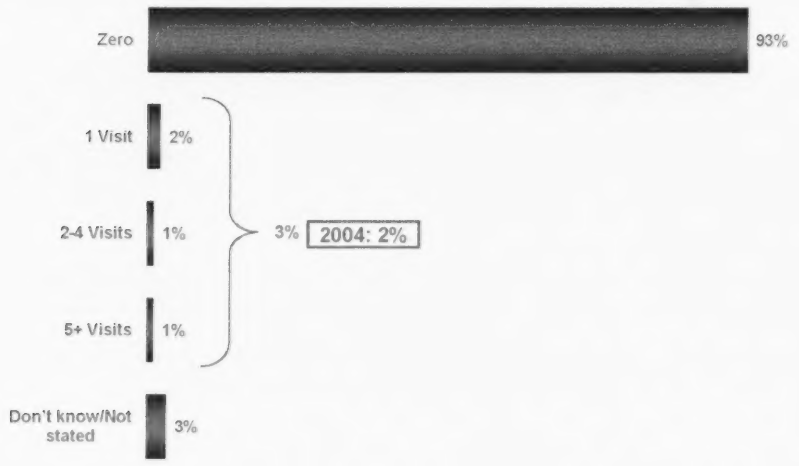
Ipsos Reid

Visiting the NEB website

Respondents with internet access were asked how often they have visited the NEB website in the last twelve months. Very few respondents have visited the NEB website; nine in ten (93%) respondents had never been to the NEB website, while only one in twenty (4%) respondents report visiting the NEB website at least once. Only two percent (2%) have visited the NEB website more than once. The proportion who has visited the NEB website has remained largely consistent with 2004, when two percent said they had done so.

Over nine in ten have never visited the NEB website; less than one in twenty have visited the NEB website

Q41. How many times have you visited the NEB website in the past 12 months?



Base: Has internet access n=846

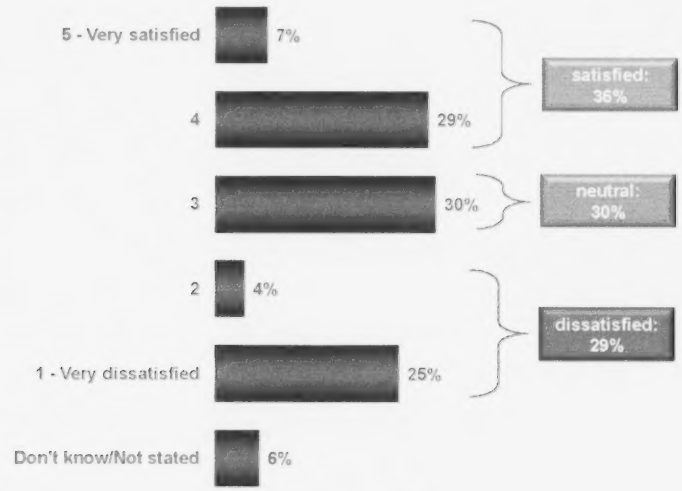
Ipsos Reid

Satisfaction with NEB website

When the 4% of landowners (or n=37 respondents) who had visited the NEB's website were asked to rate their satisfaction with their most recent visit to the website, one third of respondents (36%) report that they were satisfied, while three in ten (29%) are dissatisfied; one quarter (25%) report being very dissatisfied. It should be noted that as so few respondents have been to the website, these results should be viewed as directional in nature.

One third of those who visited the NEB website were not satisfied with their most recent visit

Q42. Overall, how satisfied were you with your most recent visit(s) to the NEB website, with '1' meaning 'very dissatisfied' and '5' meaning 'very satisfied'.



NOTE: Due to the low number of respondents, these results should be interpreted with caution.

Base: Visited the site n=37

Ipsos Reid

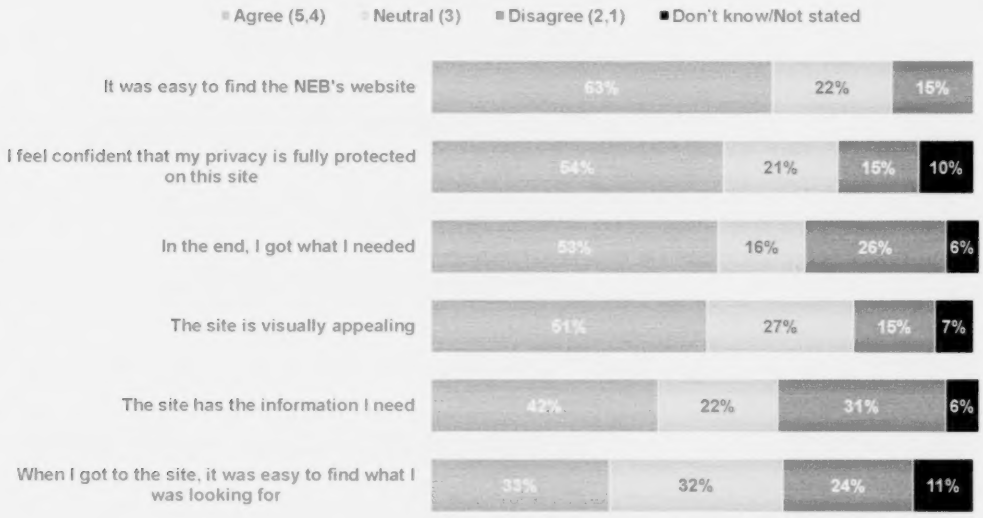
The 10 respondents who reported dissatisfaction with the NEB website were asked why they were dissatisfied. Four of these respondents report that they found it too hard to find what they needed; other issues mentioned (by two respondents in each case) included difficulty navigating the site, slowness on the site, the sense that the site is poorly designed, and problems with the search engine.

Q43. In what way were you dissatisfied with the NEB website?	
Base: Dissatisfied with site	(n=10)
Too hard to find what I need	39%
Difficult to navigate	20%
Too slow	16%
Poorly designed	20%
Search engines do not work well	16%
Other	25%

Respondents who visited the site were asked to what extent they agreed with statements about the NEB website. Three in five (63%) agreed that it was easy to find the NEB website. Half of respondents agreed that they were confident that their privacy was protected on the website (54%), that they got what they needed in the end (53%), and that the site was visually appealing (51%). Two in five respondents agreed that the website had the information that they needed (42%), and a third (33%) agreed that when they got to the website, that it was easy to find the information that they were looking for. As stated above, given the small sample size, these findings are directional in nature only.

Of those who visited the NEB website, a quarter did not find what they needed, and felt that the information they required was difficult to find

Q44. Please tell me the extent to which you agree with each of the following statements about your experience with the NEB website, where '1' means 'strongly disagree' and '5' means 'strongly agree':



NOTE: Due to the low number of respondents, these results should be interpreted with caution.

Base: Visited the site n=37

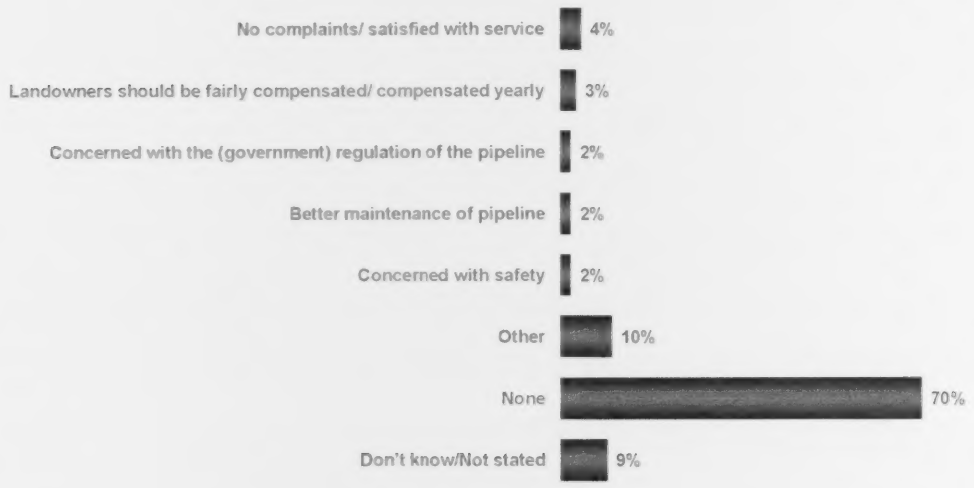
Ipsos Reid

Additional Comments

At the end of the survey, respondents were asked whether they have any final comments or suggestions about any of the topics covered during the survey. Seven in ten respondents (70%) say they had no other comments. Nine percent said they don't know. Four percent said they had no complaints or were satisfied. Three percent said landowners should be fairly compensated or compensated yearly. Other mentions (2% each) related to concerns about the regulation of the pipeline, a need for better maintenance of the pipeline or concerns about safety.

Additional Comments

Before we finish, do you have any final comments or suggestions that you would like to add about any of the topics we've just covered?



* All mentions of 2% or above

Base: All respondents n=1,200

Ipsos Reid

Appendix I – Questionnaire

Introduction
Good morning/afternoon/evening. My name is _____ and I am calling from Ipsos Reid, a public opinion research company. Today we are conducting a survey on behalf of the National Energy Board, or NEB, with people like you who either own or live on property crossed by an energy pipeline.
Am I speaking with (contact name), (OR) may I please speak to _____?
The purpose of the survey is to find out landowners' experience with pipelines on their property and to get feedback on any contact they may have had with the NEB or local pipeline company. The survey will take about 15 minutes, and your answers will remain strictly confidential.
IF ASKED:I can give you a contact name at the NEB at the end of the survey [PROVIDE UPFRONT IF RESPONDENT INSISTS
IF RESPONDENT IS NOT PROPERTY OWNER/TENANT, ASK TO SPEAK TO THIS PERSON AND REPEAT INTRODUCTION
IF PERSON SELECTED IS NOT AVAILABLE, ARRANGE FOR CALL-BACK
A. Familiarity with Pipeline on Property (Awareness)

I'd like to begin by asking you a few questions about your property . . .
1. Are you aware that a pipeline runs across or under your property?
Yes
No
Don't know/No answer

[IF NO OR DK CONTINUE, OTHERWISE SKIP TO Q.3]

2. The records provided to us indicate that you own or live on a property through which a pipeline runs. Would there be someone else in your household who could confirm this?
(IF ASKED: Your information was provided to us by the pipeline company that operates the line on your property.)
[IF YES START AGAIN AT INTRO WITH NEW RESPONDENT, IF NEW RESPONDENT "no" OR "don't know" AT Q1, THANK AND TERMINATE – CAPTURE INFORMATION ON NO & DK]
[IF YES START AGAIN AT INTRO WITH NEW RESPONDENT, IF NEW RESPONDENT "no" OR "don't know" AT Q1, THANK AND TERMINATE – CAPTURE INFORMATION ON NO & DK]
3. Are you currently an owner or tenant of this property?
Owner
Tenant/Occupant
Other (SPECIFY _____)

No longer own or live on property/sold property
DK/NA

[IF TENANT/OCCUPANT CONTNIUE, IF OTHER SKIP TO Q5, IF NO LONGER OWN OR DK/NA THANK AND TERMINATE]

4. From whom do you receive pipeline related information? (READ LIST.)

Directly from the pipeline company
From the owner of the land / the landlord
Do not receive any information about the pipeline
Other (Specify)
DK/NA

5. May I confirm the province in which this property is located? That is, the property through which pipeline runs. My records indicate that you own a property in [PROVINCE FROM SAMPLE], is this correct? [READ PROVINCE FROM SAMPLE - CHANGE IF NECESSARY. IF RESPONDENT OWNS PROPERTY WITH PIPELINES IN MORE THAN ONE PROVINCE, CONFIRM OWNERSHIP OF PROPERTY FROM SAMPLE FILE (I.E., "BUT, YOU DO OWN A PROPERTY IN [PROVINCE FROM SAMPLE], THROUGH WHICH PIPELINE RUNS, CORRECT?")]
Alberta
British Columbia
Manitoba
New Brunswick
Nova Scotia
Ontario
Quebec
Saskatchewan
Other (Non-Canadian)
DK/NA

[IF Q6= DK/NA, THANK AND TERMINATE]
6. Do you know where the pipeline is located on your property?
Yes
No
DK/NS

7. Do you know where the limits of the right of way are?
Yes
No
DK/NS

8. Can you tell me how close the pipeline is to the dwelling or place of work on the property? Is it: (READ CATEGORIES)
Within 100 metres (300 feet)
100 to 500 metres (300 to 1,500 feet)
500 to 1,000 metres (1,500 to 3,000 feet)
More than 1,000 metres (greater than 3,300 feet)
(DO NOT READ) No dwelling or place of work is on the property
DK/NS

9. Do you know which company operates the pipeline that crosses your property? DO NOT READ CODE MORE THAN ONE IF VOLUNTEERED
NGTL
Enbridge
TransCanada
Alliance
Westcoast Energy
Spectra Energy Empress Management
Trans-Quebec Maritime (TQM)
Foothills
TransCanada Keystone
Maritimes & Northeast
Montreal Pipeline
Emera Brunswick
Kinder Morgan
Other (SPECIFY _____)
DK/NA

10. Do you know if the pipeline located on your property is regulated by the Provincial or Federal regulator?
Provincial
Federal
Both (volunteered)
DK/NS

11. Could you tell me what type of product or fuel flows through the pipeline that crosses your land? (DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED – PROMPT FOR SPECIFICTY IF RESPONSE IS "GAS")
Natural gas
Sour gas
Gasoline
Oil

Propane
Jet fuel
Carbon Dioxide
Butane
Other: (SPECIFY _____)
DK/NS

12. Please rate your satisfaction with the reclamation of your right of way (that is, the land over the pipeline), using a 1-5 scale where "1" means "very dissatisfied" and "5" means "very satisfied":
[1-5]

[IF Q12=DON'T KNOW, SKIP Q14]
13. And why would you rate your view as a [PIPE Q12 RESPONSE] on the scale of 1 to 5?
13.
[Open Ended]
B. Pipeline Safety
I'd like to ask you about your perception of the safety and security of the pipeline on your land. . .
14. To the best of your knowledge, does the pipeline company check the safety of the pipeline on your property?
Yes, company checks for safety
No, company does not check for safety
DK/NS

15. Are you familiar with the requirements that have to be followed when you are doing work near a pipeline, such as an excavation or digging a fence post?
Yes
No
DK/NS

16. Whom would you call if you had concerns about the pipeline on your property?
(DO NOT READ - CODE ALL THAT APPLY)
Pipeline company
NEB
local police/RCMP
One-call Centre
Friends/neighbours/family
Other (SPECIFY_____)
Never considered
DK/NS

17. Has the pipeline company given you any information about what to do in the event of a pipeline emergency or if you suspect suspicious activity near the pipeline?
Yes
No
DK/NS

18. How concerned are you with respect to each of the following aspects of having a pipeline on your property. Would you say that you are very concerned, somewhat concerned, not very concerned or not at all concerned? How about... [READ AND RANDOMIZE]
The integrity or soundness of the pipeline itself
The security of the pipeline from malicious acts
The environmental impact of the pipeline
The impact of the pipeline on property values
The impact of the pipeline on farming, commercial or manufacturing operations

Very concerned
Somewhat concerned
Not very concerned
Not at all concerned

19. I would now like to ask you some general questions about how you feel about living or working near a pipeline. Please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree:" (READ AND RANDOMIZE STATEMENTS - REPEAT SCALE AS NEEDED)
I feel confident that the company does enough to ensure the safety of pipelines in Canada
I feel confident that the company does enough to ensure the security of pipelines in Canada, that is, from criminal or malicious acts as well as from recreational and off-road users.
I have confidence that the NEB monitors the company's performance effectively
The National Energy Board, or NEB, does enough to ensure the safety of pipelines in Canada

[1-5]

C. Company Communications

[COMPANY -> OWNER]

Now I would like to ask you a series of questions that relate to contact initiated with you by the pipeline company...

20. How often does this company contact you? Is it... (READ LIST UNTIL INTERRUPTED)

20.

Two or more times a year
At least once a year
Once every two years
Once every three to four years
Once every five to six years
Less than once every six years
Never
DK/NA

[IF NEVER, DK/NA SKIP TO Q24, OTHERWISE CONTINUE]

21. Which of the following are reasons the company has contacted you? Please choose all that apply. [READ AND RANDOMIZE]

Construction issues
Environmental concerns or Reclamation
Safety concerns
Property damage
Engineering issues
Compensation issues
Any other reasons (SPECIFY _____)
DK/NA

22. Thinking of contact initiated by the pipeline company, how satisfied were you with your most recent contact with the company? Please rate your experience, with "1" being 'Very dissatisfied" and "5" being "Very satisfied."
[1-5]

[IF DISSATISFIED (01-02) IN Q.25 CONTINUE, ELSE SKIP TO Q24]

23. What would you say is the main reason you were dissatisfied with this most recent contact with the company? (DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED)

Took too long to get what I needed
Staff not responsive
Could not get answers to questions
Too much bureaucracy
Hard to reach
Did not take issue/problem seriously
Still waiting for a response/resolution
Other (SPECIFY _____)
DK/NA

[OWNER -> COMPANY]

24. In the past 5 years have you contacted the pipeline company for any reason?
24.
Yes
No
DK/NA

[IF NO OR DK AT Q24 SKIP TO Q28]
Now I would like to ask you a series of questions that relate to contact that you initiated with the pipeline company...

25. Which of the following best describes why you contacted the company? (READ LIST, CODE ALL THAT APPLY)
Construction issues
Environmental concerns or Reclamation
Safety concerns
Property damage
Engineering issues
Compensation issues
Any other reasons (SPECIFY_____)
DK/NA

26. How satisfied were you with your most recent communication with the company about this issue in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."
The amount of time it took to make successful contact with the company on this occasion
The accessibility of the company
The overall way in which you were treated by the company on this occasion
[1-5]

[IF DISSATISFIED (01-02) IN Q26_3 "Overall rating" CONTINUE, ELSE SKIP TO Q28]
27. What would you say is the main reason you were dissatisfied with the way you were treated by the company? (DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED)
Took too long to get what I needed
Staff not responsive
Could not get answers to questions
Too much bureaucracy
Hard to reach
Did not take issue/problem seriously
Still waiting for a response/resolution
Other (SPECIFY_____)
DK/NA

F. NEB Contact and Communications

28. In the past 5 years have you contacted the National Energy Board, or NEB, for any reason?

28.
Yes
No
DK/NA

[IF Q28=No/DK, ASK Q29]

29. Do you know how to contact the NEB?

Yes
No
Don't know

[IF Q28=YES, CONTINUE, ELSE SKIP TO Q34]

The next series of questions relate specifically to contact with the NEB initiated by you...

30. For what purpose have you contacted the NEB? (DO NOT READ - CODE ALL THAT APPLY)30.

Hearing
Emergency program
Maintenance
To get information
Awareness program
Response to accident
Crossing violation/Crossing pipeline with vehicle
To make complaint/express problem
Encroachment
Other (SPECIFY _____)
DK/NA

31. How did you contact the NEB on this most recent occasion? (DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED)

Telephone
By letter/fax
E-mail
Website
In-person
Other (SPECIFY _____)
DK/NA

32. How satisfied were you with this most recent communication with the NEB in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."
The amount of time it took to make successful contact with the NEB on this occasion
The accessibility of the NEB
The overall way in which you were treated by the NEB on this occasion

[1-5]

33. Thinking now about this recent contact with the NEB, please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree". [RANDOMIZE]33.
You were able to get through to someone without difficulty
The staff you dealt with was knowledgeable and competent
You were treated fairly
Staff went the extra mile to make sure you got what you needed
In the end, you got what you needed

[1-5]

34. Have you received any publications prepared by the National Energy Board? (DO NOT READ - CODE ONE ONLY – CLARIFY SOURCE IF NECESSARY)
Yes from the pipeline company
Yes from the NEB
Yes from both the pipeline company and the NEB
Yes, from some other source
No
DK/NA

[IF Q34=NO/DK SKIP TO Q38]
35. Which of the following topics are covered in the NEB publications you have received? (CODE ALL THAT APPLY) [READ IN SEQUENCE]
Living and working safely around pipelines
How to contact the NEB
Pipeline crossing regulations
NEB Hearings
Any other type (SPECIFY _____)
DK/NA

36. Overall, how satisfied were you with the NEB information you received? Please rate this information, with "1" being 'Very dissatisfied" and "5" being "Very satisfied."
[1-5]

37. Thinking more specifically about the NEB information you have received, please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree". [READ IN SEQUENCE]
The information was easy to understand
The information you received was up-to-date
You received consistent information
You received accurate information
You got the information you needed

[1-5]

38. Generally speaking would you want to have more contact with the NEB, less contact or about the same amount of contact?
More contact
Less contact
About the same amount of contact
Don't know

And now a few questions about the NEB website...
39. Do you have access to the Internet?
Yes, at home
Yes, at work
Yes, at home and at work
No
Don't know

[IF Q39=YES, ASK Q40, IF NO/DK, SKIP TO Q45]
40. Do you have high speed internet access or dial-up internet access?
High speed
Dial-up
Don't know/ Not sure

41. How many times have you visited the NEB website in the past 12 months? (IF DK/NS CLARIFY: So, you've visited the NEB website but don't know how many times?)
[0-99+]

[IF ZERO SKIP TO Q45, OTHERWISE CONTINUE]
42. Overall, how satisfied were you with your most recent visit(s) to the NEB website, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."
[1-5]

[IF DISSATISFIED (1-2) CONTINUE, OTHERWISE SKIP TO Q45]

43. In what way were you dissatisfied with the NEB website? (DO NOT READ - CODE ALL THAT APPLY)
Too hard to find what I need
Not up to date
Difficult to navigate
Too slow
Poorly designed
Information not current
Does not have information I want/need
Search engines do not work well
Other (SPECIFY _____)
DK/NA

44. Please tell me the extent to which you agree with each of the following statements about your experience with the NEB website, where "1" means "Strongly disagree" and "5" means "Strongly agree:" [READ IN SEQUENCE]
It was easy to find the NEB's website
When I got to the site, it was easy to find what I was looking for
The site is visually appealing
The site has the information I need
I feel confident that my privacy is fully protected on this site
In the end, I got what I needed

[1-5]
45. Have you ever attended an event conducted by the NEB?
45.
Yes
No
Don't know

[IF Q45=YES, CONTINUE, ELSE SKIP TO Q50]
46. Which of the following types of events have you participated in? (READ LIST, RECORD ALL THAT APPLY)
Hearing
Public Information Session
Public Consultation/Environmental Assessment (scoping)
Technical Conference
Appropriate Dispute Resolution
Workshop
Webcast

Yes

No

46a. Have you attended any other type of NEB event?
Yes
No

[IF 46a=Yes, ASK 46b]

46b. What event did you attend? (OPEN ENDED; ACCEPT UP TO THREE RESPONSES, RECORD RESPONSES SEPARATELY)
[FOR EACH ITEM ATTENDED IN Q46 AND 46b ASK Q47-49 AND RETURN TO LOOP - IF NONE or DK SKIP TO Q50]
47. How did you become aware of this event? (READ LIST, RECORD ALL THAT APPLY)
47.
Friend
Newspaper ad
Radio ad
Other (SPECIFY_____)

48. What made you decide to attend this event? [OPEN END]48.

49. Overall how satisfied were you with the following aspects of the NEB event? Please rate your view on a scale of 1 to 5, where 1 means very dissatisfied and 5 means very satisfied. How about... [RANDOMIZE]
The date and time of the event
The location of the event
The prior notice of the event
The clarity of information about the event
The usefulness of the event

[1-5]
50. Have you ever been aware of an event conducted by the NEB which you did not attend?
50.
Yes
No
Don't know

[IFQ50=YES, ASK Q51]
51. Why didn't you attend this event? (DO NOT READ LIST;CODE ALL THAT APPLY)

No issues of concern/Satisfied with proposal/company information
Did not affect my property
Too much hassle/trouble
No time/Too busy
Not available/Out of town
Cost/Too expensive
Too far away
Application will be approved anyway
One person can't make a difference
Personal reasons (too old, poor health)
Other (SPECIFY _____)
DK/NA

G. Property/Landowner Profile

Now to finish up, a few questions about your property...

52. Were you the original party to sign the agreement that allowed the pipeline to be built on your property?

52.
Yes
No
DK/NA

[IF Q52=YES, ASK Q53]

53. When you were approached to negotiate an easement agreement were you given the choice between a lump sum or a periodic payment?
Yes
No
Don't know

54. Which of the following best describes how your property is currently used? (READ - CODE ALL THAT APPLY)
Residential
Agricultural
Woodlands or woodlot
Industrial
Business or commercial
Other (SPECIFY _____)
REFUSE
DK/NA

55. And which of the following best describes the area in which your property is located? Is it... (READ - CODE ONE ONLY)
A large or medium sized city
A suburban area
A town or village
A rural area
Other (SPECIFY _____)
DK/NA

56. Before we finish, do you have any final comments or suggestions that you would like to add about any of the topics we've just covered? (OPEN END)
This completes the survey. On behalf of the NEB, thank you very much for your time and cooperation.
(IF ASKS FOR NEB CONTACT: You can contact Karen Peters at the NEB at 1-800-899-1265.)